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➤ **Publisher's Outlook**



Nadji Tehrani, CEO,
Technology Marketing Corp.

32 PRINCIPLES OF MODERN MARKETING PART 4

We continue with our series of the Top 32 New Principles of Modern Marketing. In our last installment we left off with number 16, so this month we present numbers 17–22.

Rule 17 – Be A Peacock in the Land of Penguins. Don't be a Copycat

I would like to bring to your attention to read my editorial titled, "Every Company Wants To Be A Peacock In The Land Of Penguins" (www.tmcnet.com/2370.1) in order to appreciate the importance of being different than your competition. One has to admit that the copycats at best, may only get the crumbs and the crumbs are not going to sustain a viable business. Having said that, there is no other way to gain market dominance but by having an outstanding product and market it similar to a peacock in the land of penguins. Of course, it is easy to be a penguin, they all look alike and they all are a copy of one another. Obviously, it is extremely difficult to be a peacock in the land of penguins, but it is not impossible and when you achieve it, I am sure you will enjoy maximum market share and you will find that all of the difficulties were well worth the effort.

Many companies in the past have done an exceptional job of being a peacock in the land of penguins and much of that stems by being a pioneer. Some examples are; Xerox, a pioneer in Xerography in the early 60's and today, nearly 50 years later, everyone says, "get me a Xerox copy of this document." Everyone who thinks of the sneaker, the first name that comes to mind is Nike and that is also true in the shaving area, where the first name that comes to mind is Gillette. I consider all of those products as peacocks in the land of penguins. So develop your marketing strategy to position your company as a peacock in the land of penguins and market it in the most powerful way, 24/7 and always remember that there are no shortcuts to effective marketing.

Rule 18 – Think Out of the Box

Along the lines of being a peacock, one must think out of the box and avoid following the trend, or should I say the competitive trend. Thinking out of the box requires extreme creativity and vision. Obviously, not everybody has that, but even if you do not currently have that type of talent in your marketing department, you need to hire people that are blessed with such attributes. Thinking out of the box will be difficult, indeed, but it will set you apart from competition and that is vitally important today if your marketing department is going to be marketing your products and services.

Rule 19 – Remember the Golden Triangle Rule

This rule says, you need to dominate, print, online, and in person at events in order to dominate your market.

Many marketing departments are extremely restricted by budgetary problems. Limited in this area, they choose only one of the above vehicles. In other words, they only choose print or online or events and that will never work. I am reminded of a company that existed in the Chicago area some 27 years ago and did not believe in anything but print advertising. Today, that company barely exists. Some 27 years ago, there was another company not far from the first company, which believed in dominating the market place and developed a marketing strategy accordingly. That company became extremely successful and the founder of it is a multi-billionaire today. He is a friend of mine and I am telling it like it is. In fact, whenever the founder of the company sees me, he says, "Nadji you helped me build my company and I'll never forget it!"

Nadji Tehrani, CEO, Technology Marketing Corp.

In other words, don't look for shortcuts. Dominate all three areas of marketing with an effective, out of the box thinking marketing plan and you will find that no competitor can take anything away from you.

Rule 20 – Innovate, Don't be a Copycat

Please forgive me for being slightly redundant in some of these. One of the greatest rules of direct marketing is that if something is important, repeat it several times in your marketing and advertising copy; because executives are extremely busy and they only skim a marketing piece or advertising piece and if you don't repeat it a few times in different ways, they will probably miss the point. Therefore, it is in this spirit that I keep driving the importance of innovation and avoiding being a copycat. Along those lines, my father had a good point regarding the copycat. He said that, "if the good lord wanted us to be copycats, we all would have been created as monkeys!" and with all due respect to Darwin's theory, I believe such is the case.

Rule 21 – Focus on Strategy: Seat of the Pants Marketing Doesn't Cut it Anymore

I love entrepreneurs. They are really and truly a different breed of cat. They all have tremendous egos.

If the ego is out of control, they get nowhere. But if the ego is managed and properly directed, they will go everywhere.

In the call center industry, I have noticed two executives, both extremely intelligent, business savvy and were blessed with powerful egos. In the first case, the ego was under control and that person is a billionaire today. In the second case, the ego was not under control and even though that person had greater business skills, he only became a multi-millionaire. So the ego can be a double-edged sword. If you don't have it, you cannot have outstanding achievements and if you have it and it's out of control, it will definitely hurt you in the long run.

Having said all of that, one of the problems with most entrepreneurs is that they think they

know everything better than most and therein lies a major problem for their growth. Indeed, many of them depend on seat of the pants marketing, which may have worked years ago, but it doesn't work today. Marketing must be sophisticated, be well planned and well strategized to be effective, and once again, there is no shortcut in these guidelines.

Rule 22 – Focus on Quality Lead Generation and Follow Up

As I have stated in many of my editorials, one of which was titled, "Lead Generation, the Forgotten Art in Marketing", lead generation, indeed plays a vital role in business. Suddenly, companies who didn't seem to care about lead generation in the 80's, 90's and even as recently as a few years ago, are all interested in lead generation today. What makes matters worse is that the universities also do not teach or explain anything regarding lead generation to the students. If my experience with one of the leading universities is any indication, the word lead generation does not exist in the curriculum of the marketing department either under graduate or graduate departments.

To me, that is a crime because just as "companies live or die from repeat business, "by the same token you can also say that "companies live or die from quality lead generation or lack of it."

Suddenly, corporate America has woken up to this very important fact.

The other problem in lead generation was that in the past ten to fifteen years ago, many companies would spend a lot of money attending trade shows, marketing and advertising to generate leads and 80 percent of the time the leads were not followed up or they were given to a very poor sales staff which could not generate any business from them. I thought that was a disgrace. But today, I am happy to say that many companies have come a long way and are working with us toward quality lead generation on a regular basis.

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

Dear CIS Readers,
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Dear Andrea,
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- Display additional information when the call is delivered to an agent

The advantage here is that you create time savings by automatically letting the right agent deal with the right customers. And, it is always a good thing to prioritize the 20% of your customers who bring in 80% of the revenue!

Do you have a question for Andrea?
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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.


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CRM On The Move

By Brendan Read, Senior Contributing Editor,
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Altitude uCI™ has not gone unnoticed by several market analysts and the industry media; we have received more than 30 awards.



Rich Tehrani, Group Publisher, Technology Marketing Corp.



Around the Industry, Innovation Abounds

There are so many new trends taking place in the call center and CRM markets – and so many of them are worth sharing.

Mobility

Perhaps the one with the most human interest is Salesgenie – I am sure you have seen the company's ads on TV where they offer you leads to help you sell more effectively. Now the company has a mobile site, which lets you access your leads (even your 100 free leads) via a mobile Web browser, which will work very well with a device that has a resolution of 320X240 or better. This news shows you just how seriously companies are taking mobile devices these days and moreover shows the trend towards using mobile devices as laptop replacements.

Green/Offshoring Replacement

While many companies are being forced to reduce costs, most do not want to offshore as they want to keep jobs in the U.S. In addition, there is a drive at many organizations to go green. In order to achieve all of these goals simultaneously, you can work with West Corporation — the 800 pound gorilla in the contact center outsourcing market and take advantage of their West At Home solution, which uses high-quality home agents. What sorts of savings are we talking about here? With the average home agent round-trip commute equaling 30 miles, for 300 agents, the total yearly reduction in vehicle miles traveled is an astounding 3,285,000 miles, or a 2,793,258 pound yearly reduction in air pollution!

New U.S. Call Center Openings

The U.S. is seeing call centers replace lost jobs. Call centers are responsible for at least three million jobs and counting and some of the more recent openings are from AT&T who has opened centers in Detroit and North Carolina and more recently, SIPRelay, who opened a call center in Utah. The company offers a free service that enables deaf and hard-of-hearing individuals, located anywhere in the country, to quickly and easily communicate with hearing phone users from any PC or mobile device.

Hosted/Mashups

Here is another double-trend. Broadsoft — a leading application server company providing solutions allowing service providers to provide hosted IP communications solutions has seen its platform used by C3IP ([News - Alert](#)), a reseller to combine Broadsoft's Broadworks CRM platform in a mashup with ACT! by Sage Software. The solution allows ACT! users to have seamless access to integrated VoIP/CRM solutions. In addition, this solution allows service providers to provide hosted CRM/IP communications solutions allowing a company to take advantage of the best of the hosted and CRM worlds.

The Millennial Generation

The Economist Intelligence Unit and Genesys ([News - Alert](#)) have released a new global survey that indicates most companies are struggling with how to adapt their businesses to serve a new wave of consumers from the Millennial Generation.

This survey examined how consumers born between 1982 and 2001 will impact the customer experience. Researchers asked C-level and senior executives from around the world how they are creating a customer experience to attract and retain Millennials.

It is no surprise that companies need to examine not only what they should offer to this demographic, but how they should offer it. Will contact centers be relevant to these consumers or will they prefer the Web site and self-service channels? One wonders in fact if this generation will expect contact center agents to communicate with them via Twitter or their pages on Facebook ([News - Alert](#)) or other social networking sites.

The study found a chasm in companies who are debating heavily whether to invest more in catering to aging baby boomers versus next-generation consumers. In fact, 42 percent reported that they should tilt toward younger customers, while 39 percent would shift toward baby boomers and generation X. The decision on which way to lean can have a significant impact on the communication channels that the company will place the most focus. Of course one expects the product mix of individual companies to play a part. I would imagine companies selling laxatives and snowboards may be looking at Web 2.0 technologies from different perspectives.

Most companies participating in the study, or 54 percent, have not yet set their strategies or marketing for Millennials even though they overwhelmingly agree that such steps are needed. As many as 75 percent of companies said that Millennials will impact their organizations as consumers in the next three years, indicating the need for evaluation of internal strategies.

Many of these companies have also indicated that they have a sophisticated understanding of what it would take to adapt to the changing market, but are not ready to change their customer engagement model by leveraging social networks, peer marketing, better online support, text messaging and blogging.

The problem with lagging behind in these channels is that these companies could easily miss out on important revenue opportunities. While certain traditional communication methods are enough to meet the basic needs, today's young consumer is generally not content to simply call a call center agent to ask a question.

This consumer wants real-time information they can access themselves. An important key here, however is that this consumer still wants help to be available if they need it. Considering the growth in this market, companies will find themselves losing ground if they do not leverage technologies that this growing demographic is using to make purchases, view ads, share information, make decisions, etc.

This report highlights the urgent need for businesses to invest in new modes of customer communication and to tailor their approaches to match customer preferences. If these companies fail to do so, they will miss out on significant opportunities.

Rich Tehrani ([News - Alert](#)) is Group Publisher, Technology Marketing Corp.

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In Honduras, a growing number of U.S. companies are discovering ideal conditions for call center and back office operations. With 850,000 people between 18 and 35, Honduras has the largest young work force in the region, many of them bilingual. Low labor costs, a recently liberalized telecom industry, and a nearby location that overlaps U.S. time zones all combine to make Honduras a most attractive destination for investment in the service sector. Put Honduran hospitality on the line with your customers. For more information or a meeting, call FIDE, **1-866-588-1153**, on the Web at investinhonduras.org.

HONDURAS
in perfect position

By Tim Searcy



We Sure Get A Lot Of Questions Here!

One of the truly enjoyable things about working at the American Teleservices Association is the opportunity to answer our members' questions. We field about 700 or more questions per month on a wide array of topics. As you can imagine, members ask us about everything from the size and future of the industry to where to go to find certain services or providers, and of course we are consistently addressing federal and state regulatory compliance questions. Because we receive the same questions repeatedly, it is apparent these questions must be on many individuals' minds. For that reason, I decided to highlight our most frequently asked questions from our members, and the answers we give them.

About the Industry

Q: What impact did the Do-Not-Call Registry have on the industry?

A: A lot! Five years ago we had about 6.5 million people employed in the teleservices industry, today, there are about 5.3 million people employed as teleservices professionals. The outsourcing part of the industry has grown tremendously as in-house operations have decided the cost of compliance and the uncertainty of regulation made it a better decision to focus on their core business.

Q: What are the hot spots overseas for putting up new call centers?

A: It depends. It depends on a variety of factors including application, audience, product, service, and previous experience. However, the industry is full of consultants and practitioners that can be of assistance. Without a doubt, the Philippines and the Central America and Latin America (CALA) areas are very popular because of abundant inexpensive labor and language skills. To learn more, simply go to the ATA website at www.ataconnect.org or www.tmcnet.com

About Compliance Issues

Q: Am I really subject to this regulation, law, or legal interpretation about my business?

A: We receive this question all the time. Some ask about specific regulations, and some are just curious about jurisdiction over their industry in general. About 99% of the time, the answer is an unequivocal yes. It continues to surprise us that many companies still don't believe that the Telemarketing Sales Rule or Telephone Consumer Protection Act and subsequent rules and amendments apply to them. In reality there are very few exemptions, and those exemptions can be handled on a case by case basis on our Web site or with a simple phone call.

Q: What is on the horizon for regulations and legislation?

A: It's hard to tell, but the recent amendments by the FTC ([News - Alert](#)) to the TSR give us some comfort that no additional federal regulations can be expected in the foreseeable future. However, the states are very active, and the topics of customer service and inbound service technology around service levels have become lightning rods for state legislative action.

Q: How does the ATA help me stay compliant in this complicated and changing environment?

A: The ATA helps members stay compliant through a host of resources both in terms of databases and legal guidance. For example, the ATA has the most comprehensive Regulatory Guide which includes all current regulations and enforcement actions for each of the states as well as the federal government. More importantly, we have professionals on staff as well as legal counsel for members to use on an as needed basis. In addition to research and people, we provide a peer-to-peer experience in the form of seminars, conference calls and an annual legislative summit which lets you work with others to understand best practices.

About the ATA Self-Regulatory Organization

Q: What is the ATA-SRO?

A: Simply put, the ATA Self-Regulatory Organization (ATA-SRO) was designed to vet practical standards that deliver a positive channel experience for consumers. This process allows us to tackle tough issues, bringing to light obstacles that would face an industry and possible solutions that would allow business and consumers to "live cohesively." By doing this within the industry, we would be better advised of issues negatively impacting

consumers and the solution impacts to business. The result is a more proactive dialogue inside our channel community as well as with regulators.

Q: What is an ATA-SRO Trustee?

A: A firm that elects to become a Trustee through this organization has the opportunity to help guide the direction of the ATA-SRO. Trustees are directly involved in leading compliance and regulation within the Teleservices industry by crafting and reviewing the ATA Standards. Not only do the Trustees have the authority to shape the standards that guide compliance, but the opportunities to manage the internal processes and policies are immeasurable. Trustees will ultimately determine which companies are worthy of various levels of accreditation, as well as participate in situations involving remediation with the FTC.

Q: Can firms who are not members of the ATA participate in the ATA-SRO?

A: Yes. Member and non-member companies are encouraged to adopt the ATA-SRO as their compliance and regulatory platform. All contact centers and individuals who work in the teleservices industry should educate themselves on how they can proactively protect their businesses from the potential impact of investigations and fines.

If you have questions about the teleservices industry, give us a call at 317-816-9336, or drop us an e-mail at contact@ataconnect.org or visit our website www.ataconnect.org.

We love to answer questions, and undoubtedly it is something we do very well.

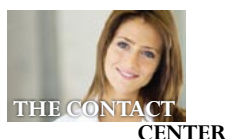
— Tim Searcy serves as the CEO of the American Teleservices Association (ATA).

REMOTE agents or Remote Headaches

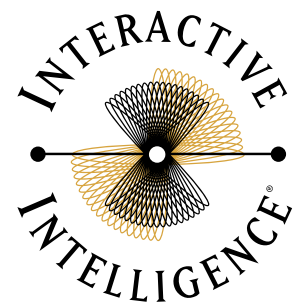
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Europe & America: Two Contact Center Managerial Cultures

Decentralization and innovation versus cost-control and efficiency. But can't you have both?

In researching the markets for agent-facing applications in the U.S. and Europe, I found that there is an interesting, quirky difference in the way contact centers are organized in those two regions. In general, centers in Europe tend to be smaller, and linked into networks of more decentralized multi-site centers, than their American counterparts.

This is not to say that it's an ironclad rule, but it's a trend. It emerges from the relative greenfield environment that you find in Europe and from the multilingual environment. It also stems from the time lag in technology adoption, giving the later adopters (Europe) the advantage of going in with more advanced iterations of what's being used in the U.S.

Regardless of the cause, this slight difference in organization manifests itself in an interesting managerial phenomenon. Many of the vendors and contact center practitioners I spoke to in Europe suggested that the typical center in that region tends to be more innovative in its practices, more open to new technologies and operating techniques. The theory is that with managers running smaller, less centralized sites, they act like (and ultimately become) laboratories for trying out new technologies and ideas. They are less beholden to a single organizational view of how things should be done.

At the same time, there's a counter-trend going the other way. In the U.S., remote and other types of dispersed workforces are on the rise. Europe isn't quite as enamored of that model as the Americans are.

Remote agents are not the same as smaller, decentralized centers. In fact, one of the hallmarks of the American move to create a flexible workforce through remote reps is to provide them with technology that "virtualizes" them — that makes them utterly transparent to their managers, as if they are onsite. In effect, a remote workforce is part of a large, virtual center, with managers having as much control over the whole as they would if all the agents were in one room.

And that's the key, I think — that American managers want to manage the whole as if there were in one room. No matter how many centers or agents are part of the network, the key American mode of management has been to roll all the parts together into one coherent unit.

There are advantages and disadvantages to either style. Also, neither market is monolithically one type or another.

So two questions emerge. One is about technology: How will the agent-facing applications (like quality monitoring, workforce management, analytics) support (or hinder) either type of management scenario?

And the other is about labor: Will the coming dispersal of agents into multisourced workforces globally have any impact on either style of management?

The technology question is the one with the easier answer. Agent-optimization tools of various kinds have been coalescing into very powerful suites that are capable of managing the entire lifecycle of an agent in his or her job, from onboarding through training into evaluation and scheduling. By putting all the tools that touch the agent into one overall structure, managers can make better decisions about how to allocate resources. They can shift emphasis from one contact mode to another, for example, or they can deliver on-the-spot coaching to fix an interaction problem. These optimization tools are widespread (but not ubiquitous) in the U.S., and less-well penetrated in Europe.

And they will affect the different managerial cultures in different ways. In the American-style central model, they support the traditional cost-control imperative that continues to be the major factor in contact center planning. Tools that were traditionally used separately as single-purpose efficiency drivers — things like call recording and workforce management — are now able to work in concert. That means that instead of simple benefits (optimized schedules or adherence to scripts), managers can act to reap more subtle benefits. They can know who needs training in a particular type of call, for example, or who is best skilled to convert an upsell opportunity.

Even as agent optimization tools get more sophisticated, with the addition of scorecards and dashboards and integrated analytics capabilities, American contact center users mainly want to squeeze more efficiency out of their resources. They are less interested (perhaps less aware) of

how to use these concentrated tools to make an impact at the enterprise level, by converting ordinary contact center behavior into metrics that are relevant to upper level execs.

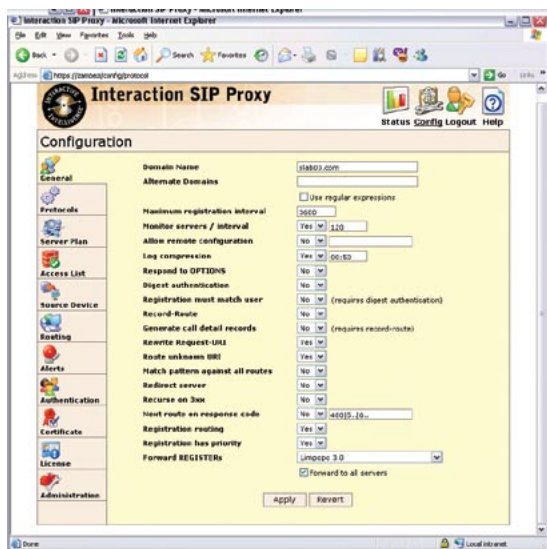
In Europe there are more opportunities for experimentation in processes. Frost & Sullivan's recent research detected an inclination among European contact center operations to explore some of the newer, more analytical applications in ways that drive enterprise growth, not just contact center efficiency. We are seeing more integrations between business intelligence tools and contact center agent optimization tools. And with so many more greenfield operations being created in areas like eastern and southern Europe, the opportunity to leap over legacy technologies is giving many operations a technical advantage as they go straight to advanced IP call handling infrastructures. Managers of those centers, who have less investment in old-style cost-control processes, can tinker with different styles of training, skills-development, customer handling. In many ways, it's an enviable position to be in. Let it be noted, though, that many locations in Europe are still encumbered by old work rules that restrict that very flexibility, though this is changing quickly.

Multisourcing is a fancy way of getting your labor from a wide variety of places — some in-house, some remote, some outsourcers, some offshore. What I suspect the multisourcing and remote agent trends are going to do is smooth out some of the variability between the European and American models. We will see a melding of the process innovation that Europeans now exhibit, with the labor flexibility that the Americans have. And it will all be spread across a multinational, multi-modal customer landscape. Companies will be able to shade their operations toward whichever goal best fits their corporate culture: cost-optimized labor forces, enterprise-optimized metrics, or some combination of the two.

Clarify the conversation.



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www.tmcnet.com/2456.1**INTERACTIVE INTELLIGENCE LAUNCHES INTERACTION SIP PROXY 4.0**

SIP can make communications environments in contacts centers more reliable, secure and easy to manage, areas that are being addressed with Interactive Intelligence's (News - Alert) new Interaction SIP Proxy 4.0. The SIP proxy product handles routing interactions between servers in a SIP-based IP telephony environment. It's especially geared toward distributed enterprises and contact centers. It includes a new feature, source-based routing, that makes it possible to route interactions based on their place of origin. The feature results in a simpler deployment process and more operational efficiency, along with enhanced security. Version 4.0 is validated for virtual use with VMware ESX 3.0, which an enterprise-grade virtualization platform. This reduces further the number of servers required to run an all-SIP environment, plus it results in cost savings, and reduced power demand for a "greener" solution.

www.inin.comwww.tmcnet.com/2452.1**EONE INTRODUCES CONTIVIO VIRTUAL CONTACT CENTER SOLUTION**

Stretch Technologies' flagship product, Contivio, created by eOne Solutions Group, will now be available in the U.S. Using this solution, customers can set up fully-integrated virtual contact centers

using only a browser and a broadband connection. It is designed to extend the core functionality of existing CRM solutions such as Salesforce.com, Microsoft Dynamics CRM, SugarCRM, SalesLogix, SAP, and Oracle (News - Alert) into a fully featured contact center. Integration is accomplished by using integration 'Angels': a group of software tools that extend application integration and automation capabilities.

www.contivio.comwww.tmcnet.com/2453.1**NEW INCENTIVES MAKE PUERTO RICO MORE DESIRABLE LOCATION**

Puerto Rico means 'rich port' in Spanish. A new package of investment incentives that came into effect in July has enriched the value proposition of locating contact centers and IT firms there. They include a four percent flat corporate tax rate, down from seven percent, a 50 percent tax credit on product research and development activities that can be used to reduce taxes further, or be sold to other companies, which replaces a tax deduction for those costs, and a 10 percent rebate on

energy bills for 10 years. The incentives sweeten Puerto Rico's value proposition of a unique taxation structure and highly-educated bilingual labor while being part of the U.S. The contact centers, internal support desks, and IT firms now there include Microsoft, Atento, Axon Global, Cascades Technologies, Corsidian, Honeywell (News - Alert), and Lockheed Martin, reports the Puerto Rico Industrial Development Company.

www.pridco.comwww.tmcnet.com/2454.1**ETP'S XELIGENCE CRM ANALYTICS PLATFORM TO DEBUT**

eighty twenty plus (ETP) will showcase its Xeligen Analytics Platform for business performance and efficiency to enterprises and organizations at the 2008 Financial Services Technology Forum Oct.28-29 at the Design Exchange in Toronto, Ontario, Canada. ETP's methodology is based on finding what it says is the right balance and integration of people, process, information and technology. The firm offers the Xeligen Analytics Platform in industry-specific versions for financial services, insurance, telecom/media, retail, manufacturing, and healthcare. Xeligen automates generation and integration of predictive analytical algorithms within

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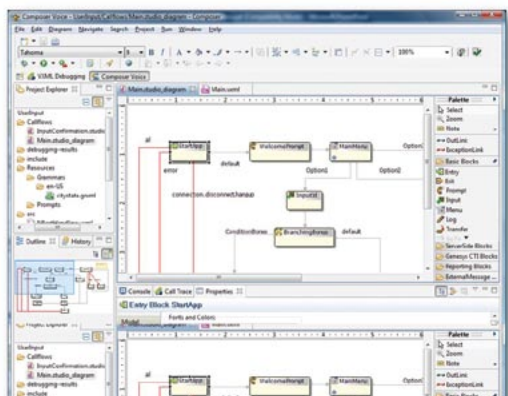


enterprise business processes and systems. Users can configure and trigger the production and deployment of predictive models within areas such as enterprise CRM (cross-selling/up-selling/customer retention), credit scoring, pricing and charge-off and default prediction

www.eighty-twenty.com

www.tmcnet.com/2462.1

GENESYS DEBUTS GENESYS VOICE PLATFORM 8 FOR IVR



Genesys has debuted the Genesys Voice Platform (GVP) 8 for IVR. The new solution significantly improves the customer experience through the alignment of self- and assisted-service and integrating voice across all customer service environments through open standards. It offers tight integration with both SIP and with the intelligent Customer Front Door (iCFD) solutions from Genesys and its partners. It also provides a single development environment for contact centers that use the Genesys Customer Interaction Management (CIM) platform.

www.genesyslab.com

www.tmcnet.com/2455.1

SYNTELLECT LAUNCHES SURVEY MANAGER

Syntellect ([News - Alert](#)) has launched Survey Manager, a new integrated survey module for the Syntellect Customer Interaction Management (CIM). Survey Manager gives customers the ability to provide valuable feedback about their customer service experience. The product's integration with Syntellect CIM also means that follow-up actions, based on survey answers, can be

automatically assigned to agents or queues. This is advantageous for responding to a poor customer experience or taking advantage of a potential sales opportunity. These surveys can provide immediate feedback and either be offered as IVR surveys or delivered later via e-mail through the survey Web site. Individual survey campaigns can support voice, e-mail and Web chat interactions simultaneously.

www.syntellect.com

www.tmcnet.com/2457.1

ASTUTE SOLUTIONS INTRODUCES EPOWERCENTER 7.0

Astute Solutions has introduced ePowerCenter 7.0, the latest version of its customer service application. It has more than 400 updates that address traditional business challenges and those of the extended contact center. RealDialog Agent Assist Integration provides agents with a conversational knowledge management tool that improves quality and accelerates issue resolution and agent ramp up. Web Chat

Integration enables agents to converse with consumers in real-time, while maintaining case information in ePowerCenter. Normalization Reporting enables organizations to generate reports that display the number of issues, normalization data, and the normal factor. ePowerCenter Suggestion Rules improve agent performance, enable organizations to collect highly specific and accurate customer data, and improve fulfillment, compensation and follow-up activities. Mass Mailer facilitates creating and managing consumer mailing lists. Record IQ Integration provides a feature-rich voice and video/screen interaction recording solution.

www.astutesolutions.com

www.tmcnet.com/2458.1

OAISYS LAUNCHES VERSION 5 OF TRACER CALL CENTER SOFTWARE

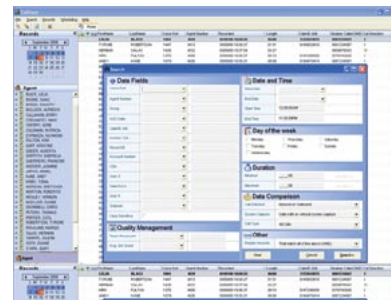
OAISYS ([News - Alert](#)) has launched the latest version of Tracer, its professional interaction management software. It comes with several significant enhancements to the features and functionality. Tracer version 5 features a newly designed, more

intuitive user interface, improved organizational functionality, allowing users to create dynamic search folders, as well as static folders, VOX recording integration for radio channels. It offers digital station-side recording without computer telephony integration dependencies, call segment sharing, allowing users to share only relevant portions of calls, a single, portable administrative interface based on Web services architecture to manage an entire OAISYS recording solutions network. Other improvements include support for supervisor permission enabling user account creation and evaluations and enhanced capabilities in the patent-pending OAISYS Portable Voice Document technology to incorporate desktop video files. OAISYS recording system deployment will now include unlimited user licenses for the Talkument software.

www.oaisys.com

www.tmcnet.com/2466.1

CALLCOPY INTRODUCES VOIP CALL RECORDING SOLUTION



CallCopy ([News - Alert](#)) has introduced CallCopy Essential, the company's new VoIP call recording solution. CallCopy Essential helps small businesses quickly and easily capture and archive inbound and outbound calls. It was developed specifically for small offices to help companies improve customer service, increase productivity and meet compliance regulations. CallCopy Essential comes with a host of features, including a server-based architecture, which is easy to use and administer and doesn't require installation at agents' desks. Recorded calls can be easily saved by administrators as WAV or MP3 files and exported via email, hard disk or FTP. Essential also allows agents and administrators to flag public calls and add personal bookmarks to calls that can be used for training purposes and to help customer service improve response time.

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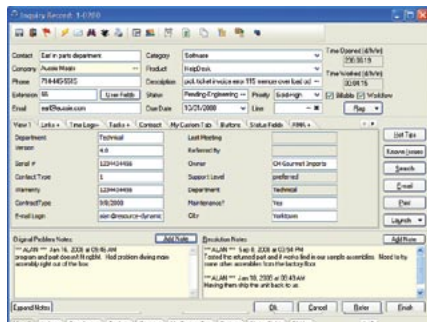
As the leading workforce optimization solutions provider, Verint® Witness Actionable Solutions™ helps organizations master their toughest customer service problems across the enterprise, from contact centers to branch locations to back-office operations. For example, our Impact 360® Workforce Optimization solution helped a major communications provider **decrease agent attrition by 55 percent** and add **10,000 minutes of productivity** to its contact center per week.

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www.tmcnet.com/2463.1**'CRM FREE' OFFER FROM CONCURSIVE**

Concursive ([News - Alert](#)) is offering to provide its on-demand ConcourseSuite 5.0 CRM software free of charge for up to 100 users for a period of one year. This offer arms businesses with a full-featured front office product available to a meaningful number of users and comes with a 100-user limit. After twelve months, businesses using ConcourseSuite 5.0 under this offer will be given the opportunity to continue the service at low promotional rates: on the order of half of the rates of competing on-demand CRM offerings.

www.concursive.comwww.tmcnet.com/2464.1**CRM-INTEGRATED TELE-SUPPORT HELP DESK VERSION 4.0 RELEASED**

Resource Dynamics has released version 4.0 of its Tele-Support Help Desk solution, featuring integration to most CRM systems. The Tele-Support HelpDesk has an updated video demo which shows a 'day in the life' of the typical use of its product. A full featured evaluation version, complete with free tech support, may be downloaded from its Web site. One-on-one presentations are also offered. Tele-Support HelpDesk tracks inquiries from inception to resolution. Features include a veritable laundry list of helpful goodies: call tracking, detailed timekeeping, priority escalation with e-mail notification, a built-in knowledgebase that can also be accessed by customers over the Internet, customer status lookup, contract tracking, Inbound/outbound e-mail processing, reporting, customized screens, inquiry work flow and more.

www.resource-dynamics.comwww.tmcnet.com/2459.1**XACTLY LAUNCHES CRM-BASED NON-CASH REWARDS APPLICATION**

Xactly ([News - Alert](#)) Corporation has launched what may be the first ever CRM-based automated employee performance application

centered on non-cash incentives that can also be applied in contact centers. The solution, Xactly Rewards, is built on Force.com and is presently only available to Salesforce.com ([News - Alert](#)) customers. Xactly Rewards provides an innovative easy to use and more effective, non-cash rewards management and fulfillment environment for motivating and rewarding the performance of sales, marketing, support, and contact center individuals and teams. Traditional non-cash rewards programs tend to rely on limited sets of fixed prizes or gift cards. In contrast, Xactly Rewards points can be redeemed for millions of merchandise items via an online catalog from the world's top brands, travel and leisure, adventure packages, and tickets to entertainment and sporting events. Contact centers and others purchase Xactly Rewards points for \$1/point and allocate them as they see fit for rewarding employees who reach specific performance objectives.

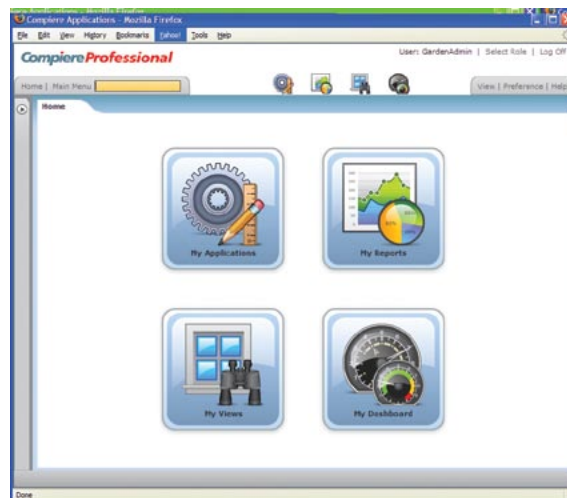
www.xactlycorp.com/www.tmcnet.com/2460.1**UCN RELEASES INCONTACT OUTBOUND DIALER V2.0**

UCN ([News - Alert](#)) has released inContact Outbound Dialer v2.0, which features a robust presentation and management structure for users. It offers improved customization tools for outbound projects, more detailed disposition functionality, script routing, and adjustable priority delivery. The solution also features custom-defined schemes, enhanced format importing, scheduled power dialing, exportable reporting, dynamic call dispositioning, improved agent screen pop with custom data display and forced, and optional agent participation modes. The Outbound Dialer 2.0, when integrated with inContact ACD, is capable of offering more controls for call flow processing and performance tracking. An agent performance optimization function include customer experience surveys and agent scoring analysis, call monitoring, call recording, workforce scheduling and forecasting, hiring tools to reduce attrition, and targeted training delivered to the agent desktop.

www.ucn.comwww.tmcnet.com/2461.1**AKOTEL RELEASES IVAN**

AKoTel Telekommunikations has released IVAN (Interactive Voice Application Network), an enterprise carrier grade call center

management product that combines the call distribution capabilities of an ACD with the data collection capabilities of IVR technology, along with all in one easy-to-use Web interface for toll-free numbers, international DID's and premium rate numbers. IVAN makes use of the freely available Asterisk ([News - Alert](#)) Open Source and will be delivered inside AsterLive. It can be run straight from the CD without installation. AsterLive uses Debian Etch 4.0 as its operating system and includes Apache, MySQL and PHP. The product supports all major ISDN HFC-S, Digium ([News - Alert](#)) and Junghans phone cards as well as their plagiarisms which are available on the market.

www.astertools.com/products/ivanwww.tmcnet.com/2465.1**COMPIERE EXPANDS, ENHANCES OPEN SOURCE ERP/CRM SOLUTION**

Compiere has started shipping Compiere 3.1, an update of its ERP and CRM product line. Compiere 3.1 includes 400 new business analyses, functional and technical enhancements. It provides global partners and customers with an easy to deploy, adaptable open source business solution which can reduce acquisition and deployment costs compared to proprietary technology. It offers customers the ability to securely analyze business data making use of third-party reporting and analysis tools. The Business View Layer helps end-users and report designers gain access to ERP data via Compiere's application-level security controls. Compiere 3.1 comes with pre-defined business views which include customers, vendors, product, sales order, invoice, and shipment data. Customers will be able to add additional secured business views by themselves.

www.compiere.com



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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.

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<http://outbound-call-center.tmcnet.com/>



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Election Technology News

In his Communications and Technology Blog, Rich Tehrani writes:

One of the most fascinating advances in political systems worldwide is the advent of technology like blogs and other web 2.0 initiatives such as social networking and video. But even the old technologies like SMS are coming into play as candidates look for any and every advantage to distance themselves from one another.

As you can imagine, with so much technology swirling around, making candidates more productive and efficient, we at TMC (**News - Alert**) became mesmerized by it all. It got so interesting to us in fact we decided to categorize all of the stories we ran having to do with election technology. After a while we realized we had developed an entire website focusing exclusively on election technology and how it transforms politics. I hope you enjoy it.

election-2008.tmcnet.com

It is worth mentioning that call centers are a vital part of the election process and now that the government has more or less outlawed telemarketing for everyone but themselves, call centers continue to be a vibrant part of the election process. We will of course continue to chart the progress of this segment of the market as well -- as you may recall, TMC has been covering the call center space since 1982 -- before the term call center was even coined.

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



Labor Day Message: Treat Your Workers Well and Be Rewarded

In his Readerboard blog, Customer Interaction Solutions' Brendan B. Read writes:

When heading off for the Labor Day weekend, think of the people who make it possible: those who work for you like your contact center agents and supervisors for whom Labor Day is a workday where they deliver the customer service that we all depend on.

And when thinking of your staff, examine ways in which you can treat them better, so that they can become more productive and loyal that in turn leads to higher revenues, lower costs, and greater customer satisfaction. You may even be recognized by your peers for the results that you have achieved.



InfoCision has proven that looking after your staff pays off. As reported in a story on TMCnet, the teleservices firm was recognized as a finalist in the Employer Achievement category of the Health Care Heroes Award, presented by Crain's Cleveland Business. InfoCision won the congrats for having implemented a company-wide, proactive health and wellness program that emphasizes individualized employee care and convenience yet at the fraction of the cost.

Not surprisingly, InfoCision has been and continues to be one of the highest quality contact center firms there is. It is the only company to win a Marketing Via Phone (MVP) Quality Award every year since the inception of the honor back in 1993.

InfoCision gets a big cheer from this corner for proving in contact centers, as well as in organizations in general, that doing the right thing by your staff is the best thing all around.

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

How Safe is the Cloud?

In his "On Rad's Radar?" blog, Peter Radzieski of RAD-INFO (**News - Alert**), Inc. writes:

Network World has a story about how an online storage site, Linkup, formerly known as MediaMax, shut down this week after 45 percent of the data was lost. Who's fault is it? Well, the article tries to figure that out.

As we have seen, outages are everywhere - Amazon, Google (**News - Alert**), etc. Five Nines is difficult especially now. My thoughts are that there are more hackers worldwide with broadband. More compromised machines. Less security precautions. Buggy, bloated software that goes unpatched. Less common sense.

All these free services have a cost to deliver. If they don't have a revenue model that is working (like Google or Amazon), then how can they afford to provide secure services to you for free? As we have seen, even GOOG and AMAZ who not only can afford it, hire top notch talent to manage it have issues that cannot be avoided. Power outages. Broken parts. Redundant failures. As any data center tech can tell you, these things happen.

A CLEC client called today with a DS3 card outage on his class 5 switch - and the redundant switch-over wouldn't work. What can you do?

Plan for the worst. Test. Communicate with your customers in the case of an event.

Visit Peter's blog at <http://blog.tmcnet.com/on-rads-radar/>

Outrageous Interactions Contest

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

Saw this news item about Interactive Intelligence's "Outrageous Interactions" contest. It's a very entertaining concept that offers a fun look inside contact centers by allowing agents to share their most memorable customer interactions. Tim Passios ([News - Alert](#)), Interactive Intelligence's Director of Solutions Marketing, offered this example of a unique and memorable agent experience:

"I'm a manager for a help desk. One day my agent received a call from a customer who had some concerns with her phone. However, he was unable to provide a resolution. So, the agent confirmed the caller's contact details and redirected the issue to me. Not knowing the specific issue she was having with her phone, I called the customer back. I have a feeling I should have waited.

When she answered the phone, she was completely bouncing off the walls. I was having some trouble calming her down. I hadn't even given her the reason I was calling or my name, but that didn't matter since she already had several names picked out for me. After about five minutes of listening to her tirade, I was about to lose it. I raised my voice telling her to calm down or I would have to hang up. All of the sudden, she said "who is this?"

There was a good minute of silence on her end as I explained that I was the representative calling back about her phone issue. It was so quiet in fact that I had to ask, "Are you still there?" She sheepishly replied "Yes." She proceeded to apologize profusely for her behavior and explained that she had been having the worst day.

Her dog was sick, she stubbed her toe, she had locked her keys in the car, and to top things off when she tried to call the locksmith her telephone started acting up. I kind of wanted to laugh, but thought better of it. Seems all she really needed was an outlet and I provided that by just listening.

Soon she was calm and I was able to assist her with her telephone issue. In no time flat, I had the problem resolved and she was another satisfied customer sent on her way... or so I thought.

A few weeks later an agent transfers a call to me. It was her! Unbeknownst to me, she had saved my number on her caller ID. She called to thank me for my patience and kindness during our call a few weeks back. Of course, I responded with "That's my job and I'm always happy to help." Then she asked me out for coffee!

Well, one crazy phone call, a few cups of coffee, and three years later she's my wife."

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

CRM Study Names Ciboodle

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

The news as of the second cup of coffee this morning, and the music is X's More Fun In The New World. You kind of knew it was the end for this band when the most fun performances on this 1984 album, their best, were covers:

CRM's Sword ciboodle has been named as a "strong performer" by independent analyst firm, Forrester Research ([News - Alert](#)). Sword ciboodle was among the companies invited by Forrester to participate in its August 29 report, "The Forrester Wave: Enterprise CRM Suites, Q3 2008."

Sword ciboodle "has pushed into the CRM market with focus on the intersection of business process modeling, customer service, and customer interaction management."

As enterprises "begin to understand the importance of truly integrating end-to-end customer-facing processes from front office to back office," the report says, "they are turning to products with native BPM capabilities that can support highly unique -- and flexible -- process flows."

The Forrester report called ciboodle "a good fit for buyers who are looking for a vendor that can bring business process acumen," giving ciboodle the highest score in the report for time-to-value.

Targeted primarily to large companies in sectors such as banking, insurance, utilities, telecommunications and retail, ciboodle is a BPM-based CRM product that enables all service channels natively from a single platform.

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

SoundBite's Sensible 'Coupons On Demand'

In The Green Blog, TMC's Green Team writes

SoundBite Communications ([News - Alert](#)) has a 'greensmart' solution that saves trees, which convert CO2 to oxygen among other life-providing benefits, which is reminding consumers or businesses of coupons or other rewards they are entitled to by receiving the coupon or reminder through e-mail, text messages or an automated phone call.

By simply showing the text message, the reward could be activated at their next purchase. If someone doesn't want the promotional offer, they simply delete it. It doesn't get any easier than that, and all while reducing the consumption of paper.

Those savings are significant. SoundBite says one tree can make almost 17 reams of paper, with a major portion of it ending up as direct mail, including coupons, or bills. The billing industry discovered that by switching to online billing, a household can save

6.6 pounds of paper a year. If 20 percent of households switched to electronic bills and payments, almost 2 million trees would be saved each year, along with a reduction of over 100 million pounds of paper.

In 2006 alone, direct mail volume grew by 1.4 billion pieces, to a total of more than 213 billion pieces of direct mail a year (USPS ([News - Alert](#)) 2006 Annual Report). With one tree creating 8,333 sheets of paper, converting direct mail coupons to mobile coupons can save thousands of trees.

The green benefits do not stop there. Avoiding printing unwanted coupons saves the emissions losses incurred in producing, shipping, and recycling these ducats.

Visit the Green Team's blog at <http://blog.tmcnet.com/green-blog/>



A CRM Insider's Views on Social Media, Facebook and Web 2.0

David van Toor, senior vice president and general manager, Sage CRM Solutions North America, recently sat down to share some advice for creating online communities.

DS: You've been in your role as Sage CRM Solutions senior vice president and general manager for just over a year now. What have you been focusing on?

DVT: Ensuring our customers have a consistent experience whenever they contact us has been my primary focus. To start with, I've been working on relationships with our customers, building them, mending some, advancing others. There is much for me to tend to.

A big part of my role is furthering connection with customers. We're finding, like many organizations, that social media tools, when applied properly, are a powerful way to engage in conversations with our customers.

DS: What specific tools are you using?

DVT: The main tool we're using is an online community. We introduced one for our ACT! contact and customer management software customers in late January of this year. In the first seven months we had more than six million page views which, we're told by Lithium, the vendor that enables the community technology for us, is great volume for a community in its infancy.

There's definitely an ongoing dialogue with our customers occurring. I'm involved frequently through my blog, which resides on the community. It provides a way to have one-to-one conversations with all our customers.

DS: Are you fielding how-to questions, complaints, feature requests?

DVT: All of the above, and here's where you start to see the strength in numbers and benefits of an active community. There is the potential to develop an enormous amount of resident knowledge on an active community. When this is the case, and someone posts a question, they'll usually get an answer within the hour or at least that day. The quantity and quality of knowledge increases while the time required to assist customers, or for customers to help each other, decreases. This nets mutual productivity for customer and vendor in time and cost savings terms, a language everyone understands.

Aim to let customers answer each other's questions, but when a question is unanswered, a support team should step in and assist.

DS: What best practices do you recommend for building an online customer community?

DVT: What's most important is the various forms of collaboration, the human factors really, that will comprise how people interact on the community. It is wise to "know thy customer" well, so you can confirm how they want to communicate with you and their peers. This will lead you to a short list of technologies and features that can deliver on these preferences.

It all sounds simple enough, but don't skip important steps. Completing the due diligence of profiling and asking your customers, checking out the potential community activities of competitors, and researching social media trends is worth the time investment.

The next criteria for success is simply community activity. A static forum, no matter how graphically slick and interactive it may appear,

does nothing to achieve customer connectivity.

There is a domino effect that needs to happen, all initiated by educating your team and careful planning. Social media certainly allows for some trial and error, so don't let a missing piece of the puzzle paralyze your momentum. I'm just encouraging sound decision making. Keep your customers and your business objectives in mind.

DS: What pitfalls should businesses avoid?

DVT: I believe in philosophies similar to those summarized by Forrester Research analysts Charlene Li and Josh Bernoff in their recent book, *Groundswell*, about social technologies. The biggest failures with online communities — or any social media tool — are the classic cart before the horse or "build it and they will come" syndromes. If you get excited about a particular type of Web technology and try to force fit your customer relationships into that model, you're likely heading for disaster.

You and your customers will be much better served by first agreeing on what kind of conversation to have and where to have it — consider your main objectives, benefits you hope to receive, specific types of information to be shared, considerations like that.

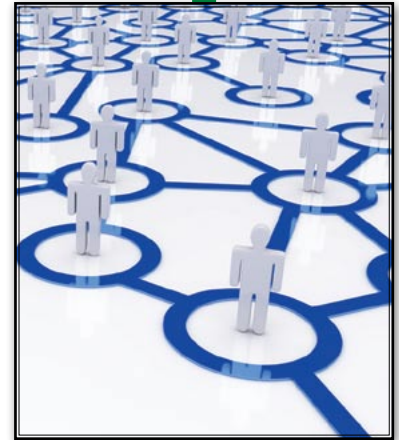
DS: What are your thoughts regarding Facebook as a business engagement model for individuals as well as the masses?

DVT: Personally, I feel that is the equivalent of a life insurance salesperson walking into a birthday party and soliciting sales. It's just bad form. I believe we like separation between our work and social lives. That said, and as just previously mentioned, there is a time, place, and way in which different types of groups like to communicate. Facebook clearly is a successful model for many people and their social groups, it's just not presently for me or the type of business experience I'm looking to provide.

DS: What other trends are you seeing emerge as a result of the Web 2.0 era?

DVT: From a business perspective, we're recognizing that many products and services today need to deliver more unique value on top of their core offering. This need is only going to grow. Consider young adults in their twenties as they enter the business world. They're not buying Microsoft ([News - Alert](#)) Office, they're using Google apps for free. Take the commoditization of formerly disruptive technologies as another example. We used to pay hundreds of dollars to get GPS in our cars, yet again Google delivers this to your smart phone for free.

The examples go on and on. Think Netflix, iTunes, and almost any Web-originating product or service. We're now thinking this way and responding to heightened customer expectations too. Our own customers can now subscribe to their preferred product edition and level of support on an annual basis. As new upgrades of their registered product become available, they get them automatically. This is what our entrepreneurial and small business customers have been telling us they want, so we're giving it a try.



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Mobile CRM: “Are We There Yet?”

Getting the mobile channel to where enabling CRM through accessing applications or web sites a.k.a. mobile CRM is as seamless from desktops is akin to taking young children on a long ride who then inevitably ask: “are we there yet?”

The answers will depend to some extent on the nature of the journey being taken. If the trip is for work, such for field sales staff and support reps the destination is in sight.

CRM suppliers have been releasing new editions that have been customized to fit hot multichannel smartphones. FrontRange Solutions' ([News - Alert](#)) GoldMine Mobile 3.0 supports the

BlackBerry platform, is integrated with its e-mail and phone mechanisms, has offline access to data, and has been designed to utilize the popular device's navigation and security management.

There are also tools such as OpenSpan ([News - Alert](#)) that can mobile-enable legacy CRM solutions like Clarify. Their functionality can be accessed by simple web applications on devices.

Maximizer Software recently launched a mobile CRM brand to strengthen its

market presence. Angie Hirata, director of worldwide marketing and business development, says that workforces are now enjoying robust CRM functionality directly on their smartphones. These include opportunity and account management, client e-mail, call logging and mapping.

“The days with a field sales rep or technician having to go back to the office to get on the desktop for updates and additional information, are over,” says Hirata.

If the travel is for everyday business, such as banking, buying products, and obtaining service via the Internet or accessing data-rich content like videos, i.e. mobile commerce or “m-commerce” then there is a little more ways to go.

Emmett Higdon is a senior analyst at Forrester Research who wrote a recently published report on financial services m-



commerce. He identified a lack of commerce-and-CRM-enabling mobile applications such as user authentication, payment methods for banking, or tools that leverage the GPS units in phones so that retailers can make offers if customers/prospects are in their vicinity.

“Mobile banking especially is waiting for a lot of that functionality to take hold before it will be adopted in greater numbers,” says Higdon. “Customers are waiting on applications that are timely, secure, location-aware, and transactional.”

Asians and Europeans have gotten a head start on mobile CRM, hitting the road as an alternative route to expensive and slow-to-install landline voice and Internet-delivering networks in those regions' countries. North Americans are now finally catching up. A new report by mobile analytics firm Bango predicts that American mobile web use will soon surpass that in the UK.

ASR, and Patience Keys To Mobile Voice CRM

Serving customers who are accessing organizations while mobile requires consideration and response to their environments.

In North America ‘mobile’ usually means ‘driving’, which means keeping the need for users to touch their devices to a minimum to ensure safety and to comply with a growing number of increasingly strictly enforced state and provincial hands-free wireless laws.

In response, there are a growing number of automatic speech-recognition (ASR) enabled solutions that allow customers to access customer care services.

John P. Joseph Vice President, Product Management and Marketing, Envoy ([News - Alert](#)) Worldwide cites directory assistance, financial services such as account information and ATM or branch location, and entertainment such as movie listings that are accessible through mobile devices via ASR.

The other reality is that mobile users still sometimes experience poor quality and dropped calls, resulting in repeated interactions to accomplish the same interactions or transactions. Contact center agents must be patient with such callers; after all they too are or will be mobile customers.

Fortunately these instances are fading, though they have not yet disappeared, as wireless coverage improves, thereby making calls easier and less costly to minutes-counting users and leading to lower call volumes and costs at contact centers.

“Well-designed IVR systems and CTI ([News - Alert](#)) software lower the call time and reduce the number of repeated connectivity encountered,” explains Joseph. “Other innovations such as virtual on-hold, where callers can request a call back instead of waiting on hold, also lessen the likelihood of connectivity becoming an issue.”

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Every morning in corporate America your competition wakes up knowing it must run faster than you. Every morning you wake up and know that you must run faster than your competition. A lion wakes up, it knows it must outrun the slowest gazelle or it will starve to death. It doesn't matter whether you are a lion or a gazelle, when the sun comes up you better be running.



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NJ Transit Keeps Mobile Customers Connected

Transit agencies have a customer care challenge that matches that with keeping their buses, trains, and ferries on time.

These departments must provide service to customers to attract and keep them out of their cars and supply customer service, both on limited and taxpayer-funded resources.

New Jersey Transit is one of North America's largest and most-service transit agencies serving in-state commuters and those bound for New York City and Philadelphia on buses, light rail, and trains.

The agency has found a way forward with mobile CRM combining a mobile-enabled site that includes a Contact Us form and a subscriber-based text message alert system that gives individual commuters up-to-the-minute travel information for their specific trips. Customer feedback is routed with a Salesforce.com CRM application to specific subject area experts for quick and accurate handling.

NJ Transit has also been testing social networking with Salesforce.com's Ideas platform that allowed customers to post ideas and view what others had said whose suggestions would be seen and analyzed by management.

These strategies have been successful. Mobile CRM has reduced call volume and in conjunction with the spread of residential IP allowed it to replace its customer service toll-free line with a conventional number, saving \$500,000 annually; toll-free service remains for the hearing-impaired using TTY devices.

Listening to customers has also already paid off. A suggestion to divert New York City-bound buses to nearby rail stations when there is congestion in the Lincoln Tunnel linking New Jersey to the metropolis has been implemented on several occasions.

"Some very good customer ideas have already been implemented and our message is we want to hear more," says NJ Transit Executive Director Richard Sarles.

"The US share of the browsing market has grown as an increasing number of phones come with bigger screens and service contracts that include unlimited Internet access," explains Adam Kerr, Vice President, Bango ([News - Alert](#)) North America.

Fast Connections Key

North American wireless carriers are upgrading their networks from 2G or 2.5G to 3G. 3G which makes Internet access, downloading and uploading data and bandwidth-intensive applications like video and conferencing feasible. 3G has also proven popular in other countries that had introduced it on a large scale. In the works is 4G that offers even greater capacity at lower costs.

Danny Locklear, Vice President, Carrier Networks Marketing, Nortel ([News - Alert](#)), explains that 3G relies on IP packet switching as compared with circuit switching with 2G and 2.5G. IP architectures

offer service providers greater flexibility and lower the cost of carrying traffic. They provide a better experience for users, as well, by making it possible to run more than one application concurrently.

"2G is perfectly good for voice and 3G is what makes mobile broadband data possible, but it doesn't end there," explains Locklear. "The next step is 4G with WiMAX and LTE ([News - Alert](#)) further improving the user experience by bringing wireless broadband closer to what you get with DSL or a cable modem. That's what we see with 3G today and that's what we will see in 4G as users demand an even better wireless broadband experience."

One of those applications is Avaya's ([News - Alert](#)) new Avaya Voice Portal, an integrated voice/video application that enables callers to interact with firms using video-based menus and content through 3G mobile devices, as well as via video kiosks or desktop softphone/videophones.

Instead of just hearing options, customers can see branded menus and options embedded in video, and speak commands to the company's automated system. Visual ads or instructional videos can also be seen while customers wait for agents.

"Initially what we are seeing is that the acceptance of these interactive video solutions is much higher in Asia and Europe due to the high availability of video enabled handsets and high speed carrier networks," says Michael Perry, Director, Avaya Self Service Applications, contact center division. "While to date the US has not adopted some of the standards as quickly but our expectation is that the devices and services will become more readily available here within the next 9-16 months."

Mobile Web issues and solutions

There are other road bumps that are inhibiting getting to a fully functional truly user-friendly desktop-equivalent mobile CRM environment, where service-enhancing and cost-saving tools like Web self-service can be fully applied and utilized.

These include a lack of mobile-friendly search capabilities, long and complicated URLs that are difficult to enter from wireless devices, and a multitude of mobile browsers and a wide array of handsets requiring CRM and other applications to be specifically written for them.

Vidya Drego, senior analyst with Forrester Research, is author of a wide ranging report, published in early 2007: "What's Wrong With The Mobile Web?"

She identified these issues, along with high data costs, as reasons why Web access via mobile devices have not been popular with users.

Since the report's publication Drego has found that some but not all of the matters have been alleviated. Among them:

- * Less costly data access thanks to more flat rate plans that make sense to users and greater competition between carriers

This is good news for marketers. A Direct Marketing Association (DMA) report, Mobile Marketing: Consumer Perspectives found that consumers, especially the young and affluent will respond to offers over their mobile devices, delivered chiefly via SMS.

Yet the study also revealed that usage costs may be inhibiting mobile commerce growth. One third of respondents to a survey that the report centers on cited airtime costs as why they did not reply to marketing pitches. Also, half of those who responded to them and over one quarter of those who did not reported strong interest in not being charged for airtime.



Key Advice To Enabling Successful Mobile Web and Data

Beth Eisenfeld, Senior Consultant at DMG Consulting, offers this advice when setting up mobile Web and e-mail and handling data:

- * Format e-mail and other information so that they can be viewed on small screens
- * Design sites that are either mobile-friendly or specific. Use less text, avoid scrolling horizontally, use few images, make good use of navigation shortcuts and links such as to site maps, search engines, and go directly to content as often as possible
- * Address security needs. If a mobile device is lost (or stolen), the company needs to have remote administration capability to disable the device and/or securely delete its contents

* Google and Yahoo! Now have mobile-enabled sites and have made their searches much easier to use. Searches are now segmented by images, media sites, and sites designed for mobile. The structures behind the links increasingly being grouped together so that users can jump directly down to the type of media they were looking for.

"It wasn't enough to display all the content, which they were doing before," explains Drego. "There had to be different ways to organize and make sense of it."

There is still work to be done. For example to avoid keying in long URLs handset makers and websites need to have barcodes and applications on phones to permit users to shoot and connect into sites.

- * There are now tools being deployed by software developers such as AJAX, which stands for asynchronous JavaScript and XML, to create interactive web and or rich mobile-friendly Internet applications.

AJAX permits data retrieval such as users' identifiers or location from the background of a Web site without interfering with the sites' pages. AJAX-enabled sites are faster loading, which gives users more continuous Web access even when they are in areas with spotty coverage.

- * A slow movement towards open platforms such as Apple's iPhone and its apps store and Google's Linux-based Android, now adopted by T-Mobile ([News - Alert](#)) for its 3G phone expected to be launched this fall.

"While there is inherently no benefit in these platforms themselves to end users, coming to a consensus in the mobile development community does make it easier to develop for these platforms," explains Drego. "That will result in more applications and services on them."

Chuck Dietrich, Vice President, Salesforce Mobile, sees the trend toward, simpler, more full-featured and user-friendlier mobile browsers. A majority of his firm's customers are using a more manageable set of mobile devices with a limited number of browsers.

"Device companies that provide low grade browsers that do not support common standards will likely lose market share by excluding the developer communities that build applications for mobile use," warns Dietrich.

David Trice, Vice President of CRM Strategy at Oracle points out that software vendors and independent software vendors have been prevented access to some device capabilities such as tighter integration to the phone, better cross application functionality and more efficient data sharing within the devices.

Mobile browsers, which are an alternative to resident/native applications, often require significant user customization to deliver quick and easy Web usage. They also sometime suffer from network-caused delays.

"We see a hybrid approach as offering significant user value," says Trice. "Critical features that are commonly accessed by users must be always available through the use of native applications. Supporting information and additional capabilities can be offered through browsers."

Martin Schneider, SugarCRM ([News - Alert](#)) director of product marketing and a former CRM analyst says the way forward lies in Web 2.0: open source applications written in XHTML that are Internet-architected that can be integrated with other browsers and applications and which offers other functionality such as mapping the next location and click to call.

Sugar 5.1, the latest version, avoids the need for companies to download, deploy, and maintain separate mobile software applications on their users' handsets. They use the same URLs to access the core products; these applications detects that users are logging in from wireless devices and not a full screen computer and reacts accordingly.

"We saw the answer lying with the browser," explains Schneider. "Mobile browsers have become so much more intelligent to present what is out there to the users, which led us to release XHTML client for web 2.0. Without a web 2.0 framework underneath, such features would be impossible to provide."

One major challenge that is gradually being resolved has been screen size and usability. Small screens and tiny keypads have using wireless devices for anything more than sending or receiving SMS or short e-mails or for quick surface web browsing not practical. In their stead are touchpads like Apple's ([News - Alert](#)) iPhone and pullout keypads.

"What we're now seeing is a new generation of handsets that is addressing this form factor issue," says Paul Gorman, Ciboodle's product management director. "As their use proliferates there will likely be more of them that begin to effectively and functionally merge the mobile and desktop experiences into portable usable go-anywhere devices."

The following companies participated in the preparation of this article:

Avaya
www.avaya.com

Bango
www.bango.com

Ciboodle
www.ciboodle.com

Direct Marketing Association
www.the-dma.org

DMG Consulting
www.dmgconsult.com

Envox Worldwide
www.envox.com

Forrester Research
www.forrester.com

FrontRange Solutions
www.frontrange.com

Maximizer Software
www.maximizer.com

OpenSpan
www.openspan.com

Oracle
www.oracle.com

Salesforce.com
www.salesforce.com

SugarCRM
www.sugarcrm.com

Seven questions to ask before you choose a contact center

No matter what your product or service, your company's image and brand is shaped by what your customers hear on the other end of the line. The impression they take away from that interaction will have an impact on your brand – either good or bad. On the one hand, your contact center can be a priceless resource that sustains and cultivates loyal customers who have immeasurable lifetime value for your company. On the other hand, bad experiences lead to unhappy customers and can undo all the years you've spent developing good relationships with them.

Selecting the right outsourcing partner is no less important than selecting the employees who work in your own offices, so look for a contact center that emulates the customer experience you would deliver. As with an employee interview, there are a few essential questions that can help you make the best decision for your business.

Is it easy to customize a program?

Taking someone else's off-the-shelf, one-size-fits-all approach isn't necessary. Make sure your account managers are asking the right questions about what's happening throughout your organization – not just the call center – and creating the solution around your business. For example, perhaps you already have a state-of-the-art billing system that you would like to continue using. A good contact center partner should be able to integrate its systems into your own as well as train agents on the intricacies of the software to ensure a seamless customer interaction.

How flexible is the pricing?

Look for a vendor that understands your bottom line. Ultimately, your goal is to transform what has historically been a cost center into a profit center. To do this, you must find a contact center that will work with you to develop a successful model that also focuses on cost containment and a high return on investment. Investigate whether your prospective partner is willing to base at least part of its compensation on the metrics that are important to your business.

What about the ability to scale?

The best contact centers can adjust to your changing business demands. From long-term staffing needs to short-term solutions, your contact center should have the ability to add or reduce the number of agents needed for your program quickly and efficiently. This is particularly important for media-driven inbound spikes, when call centers must analyze call volume history to determine adequate staffing levels so that customers aren't left waiting on hold.

Are communications open and honest?

Your contact center provider should make you feel welcome to visit the center where your program will be conducted. It is critical that you spend time getting to know the people who will be speaking to your customers. Your account team should also provide remote monitoring opportunities and generate daily, weekly and monthly reports that summarize performance. Additionally, your partner should commit to meetings on-site with you, such as quarterly business reviews, to update



*By Dana Allender,
Director of New Business Development
InfoCision Management Corporation*

you and your team on performance and objectives moving forward.

Is there a reliable, dedicated account team?

There's nothing worse than being transferred from department to department when you need immediate answers on how your program is performing. A quality contact center provider gives clients one point of contact from which they can glean all pertinent information. This person should be a dedicated liaison between the management of the program and all the supporting departments including operations, IT and regulatory compliance. Additionally, your account managers should specialize in your industry and serve as a knowledgeable resource for all your needs.

Are the agents mature and professional?

The agents making and taking your calls are representing your company in front of its most valuable assets – your customers. They should provide service with all the respect, knowledge and attention to detail that you would. To provide this level of service, a contact center should have a highly selective hiring policy and extensive training curriculum – as well as recognition programs to retain and reward top performers.

Is there a plan for continuous process improvement?

Your contact center partner should quantify and calibrate key performance metrics, providing customized, real-time reports. To ensure that your program isn't becoming stale, dedicated marketing analysts should examine those reports and make creative suggestions, supported by historical data, on ways to increase results and enhance the overall customer experience.

These guidelines provide a framework for choosing a contact center that will be a long-term marketing partner rather than just a vendor. In addition to creating immediate streams of revenue for your company, a contact center like this can boost customer loyalty and in turn generate revenue for years. Most importantly, it can enhance your market position and maintain your company's good reputation.

Dana Allender, Director of New Business Development, InfoCision Management Corporation. In business for 25 years, InfoCision Management Corporation is the second largest privately held teleservices company and a leading provider of customer care services, commercial sales and marketing for a variety of Fortune 100 companies and smaller businesses. InfoCision is also a leader of inbound and outbound marketing for nonprofit, religious and political organizations. InfoCision operates 32 call centers at 13 locations throughout Ohio, Pennsylvania and West Virginia. For more information, visit www.infocision.com.

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Workforce Optimization: Refining Products, Revolutionizing Delivery?



The suppliers of workforce optimization (WFO) also known as workforce management (WFM) solutions, defined as software that enables staffing forecasting and scheduling, are like those fine retailers who have been adding to their lines but who have not yet embraced the web channel.

WFO vendors offer new and updated solutions that improve schedule adherence, bolster, schedule management for contact center teams, add more functionality for home-based agents, and supply more support for agent activity.

These applications aggregate and integrate staff scheduling data from all sources. TDI's ([News - Alert](#)) Encore CenterPlus holds and charts this information against actual agent login and logout times captured from PBXes, ACDs, and predictive dialers, and from HR system timecard information.

Suppliers have also made their software more affordable so that small contact centers can benefit from these tools and use them to replace awkward spreadsheets for staff management.

Some of this innovation has come about as a result of mergers. Not long after Verint and Witness Systems ([News - Alert](#)) merged, in 2007, the new firm released Impact 360. The WFO/WFM solution includes new features such as outbound forecasting and scheduling, integrated desktop application adherence, and extended workflow capabilities across the suite.

One of the keys that suppliers have been using to create these enhancements is service oriented architecture (SOA). SOA, reports Wikipedia, is a systems development and integration methodology where functionality is grouped around business processes.

"Innovative WFO vendors are using SOA to make their solutions easier to develop, integrate, and to speed up the delivery of new functionality to the market," says Donna Fluss, President, DMG Consulting LLC.

At the same time, companies have been enriching their WFO solutions with new analytics and dashboard capabilities, integrated into other functions.

Envision's new Centricity product unifies Envision's core WFO applications and significantly expands performance management capabilities by capturing, aggregating and displaying valuable information at the agent, contact center, and enterprise levels.

Most WFO suppliers continue at least for the present to deliver their software via customer-premises equipment (CPE) as opposed to hosted software as a service (SaaS ([News - Alert](#))) though several leading providers are investigating that channel.

SaaS has become a popular delivery method for other solutions such as CRM because it is less costly up-front, more flexible and scalable, and requires less administrative and IT support. Its downsides are chiefly less customization, high bandwidth requirements, and latency risks.

A Gartner ([News - Alert](#)) study, "SaaS Impact on Contact Center Workforce Optimization" published in July 2008 predicts that suppliers will be slow to offer SaaS. The key reasons are that their technical efforts are instead focused on integrating suites of products as a result of acquisitions and with other features, such as with call recording, and on plugging remaining functional gaps. There is also a lack of interest in SaaS from enterprise customers.

"As SaaS-based offerings emerge, organizations should assess their suitability as part of planned upgrades, paying attention to particular aspects, such as call network and operational system integration," recommends the report.

WFM enhancements

WFM suppliers have been devising ways to make managers' work easier while improving efficiency and productivity.

IEX ([News - Alert](#)), a NICE Systems company, has done just that with two enhancements to its TotalView WFM solution.

The Express Messenger function sends automated e-mail alerts to agents and supervisors to communicate last minute schedule changes. This method is far faster and more productive than individually e-mailing, or calling agents, or stopping by workstations. The Intraday Shrinkage Management feature stays on top of daily staff shrinkage, caused by factors such as tardiness, sick calls, and early departures for illness or personal reasons. It identifies opportunities to schedule meetings and training sessions while maintaining service levels.

Workforce management entails medium to long-range planning, such as for vacations, seasonal demand, and major new product or service launches.

Calabrio's ([News - Alert](#)) Workforce Management release 8.3 has applications to enable managers to accomplish these tasks. An enhanced vacation planning module helps them approve agents' vacation requests based on the total number sought, allocated vacation time and staffing forecasts. Agents can bid on up to three vacation times, including the type and dates requested. The bids are sent to their supervisors to approve or deny the requests. E-mails containing the decisions and the comments are automatically sent to agents' inboxes.

The strategic planning module uses historical data to produce a forecast of the required resources for a given period: usually six to 24 months. Inputs can be adjusted based on historical trends and configured adjustments applied by contact center management, such as planned call volume increases or labor reductions, sales growth initiatives or special programs. What-if scenarios can be used to project forecasts and distributions based on various conditions.



Multiple contact centers, and programs entailing a combination of in-house and outsourced sites can pose schedule adherence challenges. Each site has typically required their own analyst or requires time from local supervisors who stay in touch by e-mail and phone with their counterparts, with no single view of schedules and adherence to service standards.

Pipkins (**News - Alert**) has made it possible for one person to view schedule adherence from a single screen in all locations, including that of outsourced providers, which frees up management resources while ensuring quality, without poring over text-based adherence reports.

Its Vantage Point Real-Time Agent Adherence Global solution, an addition to the Vantage Point WFM software, displays adherence levels for each center on a single color-coded map and allows for drill-down to individual sites. Schedule violations at any contact center in the network are instantly spotted and investigated with a click from a map that portrays each center's location and its compliance levels graphically instead of through text-heavy reports.

There is a graphic seating chart with each agent's name, color-coded adherence status and optional data such as non-adhering time displayed in the appropriate seating location. With this functionality managers could see for example if nonadhering agents are sitting in a group: a telltale sign that service standards are not being met by socializing.

Meeting Agent Needs Anywhere

Globalization for contact centers means that programs can be managed from anywhere to and serving customers anywhere. The challenge from a workforce management perspective is to schedule those agents and supervisors in accordance with a vast and changing menu of local, regional, and national labor regulations.

Aspect's (**News - Alert**) eWorkforce Management 7.1 allows contact centers to meet those requirements with new flexible work rules and equity scheduling capabilities. It also has improved agent schedule management using drag-and-drop schedule editing and a schedule trade bulletin board.

Aspect eWorkforce Management will soon address another staffing need: ensuring occupancy of workstations to control facilities costs. The 7.2 version, to be released in December, 2008, will have a new feature, called Reserve that will automate the assignment of agents to seats and ultimately reduce related office space and administrative costs.

eWorkforce Management 7.2 will also allow agents to be located in proximity to their supervisors, which ensures quality and productivity by preventing team members from being scattered across contact centers. Supervisors and coaches, and agents, will not have to walk across the floor to confer face-to-face.

Yet another staffing requirement, effective team scheduling, will be met as well in 7.2.

With it managers can set up team schedules up to a month in advance instead of daily at present. Aspect developed this capability from 7.1 and from the experience of clients' offshore contact centers where staff arrive and leave on buses.

Anywhere also means home. The growing popularity of home-based agents has prompted new solutions that utilize their increased flexibility, such for part-time work.

IEX's TotalView allows these agents to bid for the schedules they want to work, giving them the ability to control the number of hours they work each day of each week.

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WFO for SMBs

In the past WFO has been limited to enterprises and large contact centers because of high license and installation costs.

Now small/mid-sized businesses (SMBs) and small contact centers can repurpose their spreadsheets from scheduling to other purposes and obtain faster, more accurate and more functional WFO software thanks to new solutions aimed at them.

For example Verint's ([News - Alert](#)) Impact 360® Express, released earlier this year, contain the same core components as Verint's enterprise-level Impact 360 solution, including automated and simplified forecasting and scheduling, and schedule adherence monitoring. Yet it is less costly, easier to support, and quicker to deploy.

Impact 360 Express is also modular, enabling contact centers to add components as they grow and needs change, such as call recording, screen recording, or eLearning. More features will be on the way as technology processing and costs evolve and hardware can support them at SMB-friendly price points and deployment schedules.

The only significant differences is that the Impact 360 offers some additional technology options which frequently appeal to enterprises but did not meet the stringent requirements Verint laid out for the Impact 360 Express. They include for example performance management scorecards, speech analytics and customer feedback surveys.

For small organizations or contact centers that want these features the Impact 360 is scalable both down as well as up. And for those organizations who buy the Impact 360 Express now then later acquire the Impact 360 can easily migrate the data from one platform to another.

To SaaS or Not To SaaS

There are at present few suppliers who offer SaaS version, and most of those that do provide it indirectly through resellers.

ISC's Irene WFM solution has been hosted from the get-go, when she came onto the scene in 2001.

Irene has had some recent cosmetic surgery including a new user interface and has had her report capabilities uplifted to provide more detailed information on agent activity.

Don Koosis, vice president of operations, says demand has been slow if steady. It has been coming from both ends: small firms that need workforce management but cannot afford CPE solutions and from enterprises that want flexibility and reduce administration costs. Mid-sized contact centers that have their own solutions have seen less need to change.

"What we are finding is that our small firm clientele are staying with us as they grow to become mid-sized companies because our scalable solution has worked for them," explains Koosis.

Other suppliers have been looking at SaaS. Aspect has gone the furthest down the road. It launched a hosted e-learning and hiring solution through PerformanceEdge in July 2008. That has given Aspect experience in devising ways to make performance optimization platforms available to a wide range of clients.

"It takes a certain infrastructure, billing, and management setup to make SaaS successful," explains Aspect PerformanceEdge ([News - Alert](#)) vice president Bob Kelly ([News - Alert](#)). "We're learning this with our new offerings and you'll see in time that we will move into that area."

Field Service WFM

Forecasting and scheduling field service employees are quite different than for contact center agents.

Field service managers must take into account unique factors such as varying customer demand, repair complexity, facilities access, security, weather, and traffic that impacting on staff availability and scheduling, and parts availability on top of absences and staff skillsets. Staff must be scheduled to match customers' service level agreements and customers' availability. On occasion more than one employee or contractor or subcontractor may be needed on a call.

Yet what happens in the field also has a knock-on effect in contact centers. A repair person who is late or who does not show up will almost always prompt inbound calls, which if there are large numbers of them will impact agent availability and leading to scheduling changes.

There are specialized field service solutions. ClickSoftware ([News - Alert](#)) offers appointment management and workforce management. ClickSchedule's optimization abilities enable narrow, reliable service slots to be offered to customers in realtime. ClickForecast enables customer demand forecasting based on history, trends, sales and marketing plans. This serves as input into ClickPlan which shows if you have the capacity to meet the forecasted demand. It delivers gap analysis, what if-scenarios and decision support for adjusting staffing levels, optimizing skills mix, managing vacations and non-availability, and managing subcontractor and overtime usage.

The following companies participated in the preparation of this article:

Aspect
www.aspect.com

Calabrio
www.calabrio.com

Click Software
www.clicksoftware.com

DMG Consulting
www.dmgconsult.com

Envision Telephony
www.envisioninc.com

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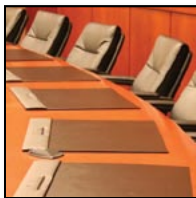
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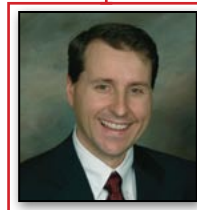
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Boardroom REPORT

Paul Jarman, CEO,
UCN

Nadji Tehrani, CEO,
Technology Marketing Corp.



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

NT: Please tell us about your company and type of business.

PJ: UCN helps customers improve the quality and productivity of their contact centers. We do this through inContact, an on-demand software-as-a-service (SaaS) model that focuses both on call routing and agent improvement as key components to creating the right customer experience with the right quality and productivity behind it. We are a full solution for contact centers including those with a distributed workforce – either at-home or multi-site. Our purpose is to help the customer be successful with our best practice knowledge and customer service expertise to achieve their contact center goals.

NT: What are the greatest challenges that you and your company are facing?

PJ: The greatest challenge we face is ensuring we understand the entire contact center and customer experience need. Our job is to provide a solution that responds to that need with tools that result in successful contact centers. Our secondary challenge is managing the exciting growth opportunities in front of us.

NT: What do you feel are practical solutions to those challenges?

PJ: We've increased our internal staff in nearly every department. We're also creating powerful new partnerships. With more people and more partners, we feel we can provide the products and services our customers need to excel.

Secondly, we've executed additional processes to handle the growth, while at the same time maintaining the high level of customer satisfaction and service we are known for. With increased organization and intelligent hiring decisions, we feel poised to manage the growth effectively.

NT: In your opinion, what is the greatest need in our industry?

PJ: The greatest need for a contact center solutions provider is to not over-complicate the solution. The greatest need for a contact center is to understand what levers affect what results. They feel the pains, but they don't necessarily know the remedy. For example, contact centers have a very high level of attrition. What many don't

know is the six things that cause it or what to do from an infrastructure standpoint to fix it. There is a lack of awareness about the significant benefits SaaS products can deliver to minimize this pain.

NT: Tell us about new developments in your company.

PJ: The major development is that we've created a product depth to further establish ourselves in the market. Customers are really accepting our solution because of our ability to solve their problems from a carrier perspective. With our agent improvement tools such as hiring, eLearning, workforce management and call routing features including ACD, IVR, CTI and speech recognition, customers are seeing the value in what we deliver through a network-based SaaS model. We are also creating leading edge innovations in our resiliency and redundancy.

NT: What would be the impact of those developments on the bottom line?

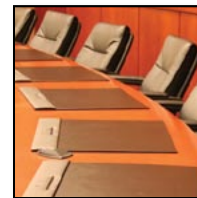
PJ: The impact is that we are seeing more people take advantage of the SaaS model. That accelerated customer acceptance is creating significant sustainable revenue for us.

Increasing the depth and breadth of our solution gives us a larger target market because we can provide great solutions for the enterprise level down to the small player. With the scope of our offering expanding to a wider range of customers who need it, we are seeing an increase in larger market revenue opportunity.

NT: How would you describe the current status of the customer interaction/CRM (or teleservices) business?

PJ: I think a lot of companies need to integrate their CRM more tightly with their call routing and agent improvement tools. Many people are still not very good at using the data in their CRM to create valuable interactions with their customers.

Integrations are tough. Typically contact centers don't have enough inside expertise, and vendors haven't made the process easy enough. Many products don't have the simple integrations necessary between point solutions – not just between the CRM and the call routing, but also the workforce optimization tools. Workforce optimization



tools don't naturally tie in with call routing tools, and call routing tools don't naturally sync well with CRMs. Until now, no one has given the market an option to get all of that in a SaaS model. InContact is the solution that enables CRMs to work closely together with all the other contact center components.

NT: What is your vision for the trend and the future of our industry?

PJ: First, I think the trend is that contact centers will purchase more software via the SaaS model — in an easier format for success and with a faster ROI.

Secondly, they will acquire solutions in a pre-integrated format. Everything from eLearning to speech recognition to ACD/IVR will all be built in a way that works together seamlessly.

Third, contact handling and agent improvement solutions will more closely interact with CRMs to better use the data available and to proactively respond to customers' needs.

And lastly, software providers will become more consultative in how they help customers achieve their goals. We have a strong track record of doing this and see this as the direction the industry continues to go.

NT: What significance do the following in the customer interaction industry (select those which are most appropriate for your business)?

- a. VoIP
- b. Speech technology
- c. Data security
- d. Home agents
- e. Offshoring
- f. Hosted solutions delivery

PJ: I think at-home agents are a sum of a lot of these. InContact is uniquely designed to help companies succeed with at-home agents. This comes from several factors.

First, from our ability to act as a telecommunications provider and offer multiple connectivity options to the customer. These telecommunication connectivity options include: VoIP, TDM, private lines, point solutions, switched and dedicated T1s. As a carrier and a technology provider, we can give our customers a lot of choices to connect their agents.

Secondly, we have a product that is really omnipresent. Companies can have agents at-home in fifty different locations, without needing additional equipment. Providing efficient call routing is the basis for employing at-home workers, but the agent improvement tools and management pieces enable at-home workers to be successful.

The inContact platform allows our customers to hire and train the right agent, manage the agent's schedule and provide customer-based feedback to the agent in near real-time. Add to this the ability to get the right contact to the right person with very minimal infrastruc-

ture cost and a very quick ROI. We empower an industry that has suffered for a long time because they either didn't have the breadth of tools, or the prohibitive costs kept them from being able to implement the right solution.

We've also made advancements with how we handle data security and how we use VoIP and TDM at the same time with the same system. Our connection model isn't restrictive.

From my perspective, all of the items you've outlined are important. Some providers can only speak to one of them or a few of them. We are addressing all of them with a complete suite of products and underlying communications technology not found from most providers. InContact is the hosted solutions delivery platform with the call routing tools, agent optimization solutions and network infrastructure needed for a contact center to be successful.

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

PJ: Our greatest core competency has to be people. People drive results which drive strategy. Then after people, it's the breadth and depth of our contact handling platform tied seamlessly to a network with all the resiliency, redundancy and connectivity options. I would also say one of our greatest core competencies is empowering distributed workforces; our ability to really solve the entire problem of a company's offshore, home shore and multiple-site challenges while achieving a quick ROI through the SaaS model.

NT: What is your company's positioning statement?

PJ: We deliver what is necessary for our customers to have a competitive advantage over their industry peers. We can change their productivity and quality while at the same time lowering their operational costs.

Our technologies can leverage that possibility while still being low risk. Our customers can pay-as-you-go with a minimal investment and get a three-to-six month ROI versus a one-to-two year investment where they would be risking a million dollars. Contact centers can configure our solution without buying servers or hiring more IT people; this can really shorten the rate of return. With our SaaS model, the width of the products and our framework as the network infrastructure provider, we can change our customers' quality and productivity, to give them a competitive advantage. The risk is much lower than what has traditionally been available in the industry.

NT: How do you differentiate your company?

PJ: A lot of the vendors out there today are selling only limited point solutions. They are addressing one little piece of the problem. We can go in and solve nine or 10 pieces and each solution is pre-integrated. A company making a call center technology decision can get a product without all the usually painful integration challenges.

Secondly, our network is a competitive advantage because we can deliver these technologies with all the connectivity options — but without the competitive network costs.

NT: Thank you very much for your time.

Do Not Call, Five Years Later



October 2008 marks the fifth anniversary of the often controversial US federal Do Not Call (DNC) registry, though individual state had started DNC lists several years before and many continue to have them. DNC compliance is enforced by the Federal Communications Commission (FCC ([News - Alert](#))) or by the Federal Trade Commission (FTC).

So we asked direct marketing and teleservices leaders what has been the impact of the DNC on compliance, complaints, operations, demand for teleservices, and on outbound campaign costs and effectiveness. We wanted to find out from them if they could change the legislation what aspects of it would they modify, and why. Finally we sought to find out where they saw the DNC going from here, going forward.

Here are their responses:

American Teleservices Association (www.ataconnect.org)

Tim Searcy, Chief Executive Officer

The impact of the DNC has been dramatic. Campaign costs have remained stable because of the increased costs of compliance. However, more campaigns have been deemed profitable because average conversion rates have improved by 20-30 percent on average. The DNC has clearly decreased the overall pool of available numbers, and the resulting decline in overall program size has resulted in a decrease of about 1.2 million jobs. It appears that the DNC is effective in cutting the consumer complaint pace, and we have seen a slowing of traditional complaints to the FTC. But fraudulent use of the channel and confusion about compliance requirements are still issues which need to be addressed through education and enforcement every day.

It is difficult to put the genie back in the bottle. The DNC legislation has a few flaws that over time are being worked out, but without a doubt, the issue of exclusive jurisdiction is the biggest problem. Currently states view teleservices regulation related to DNC and all other aspects of the channel to be fair game for legislative action. The reality is that the federal law should clearly pre-empt state laws so that the patchwork of laws is consistent.

I hope the DNC goes nowhere else, but my fear is that the political advantage of attacking this industry will trump common sense. Discussions have begun concerning expanding DNC provisions to inbound calls, in effect forcing companies to consider the DNC choice of a consumer prior to offering additional products on an inbound call. Some states would like to extend the provisions to included business to business calls, fundraising calls and political calls. None of these choices make sense, nor would they improve the customer experience.

Direct Marketing Association (www.the-dma.org)

Jerry Cerasale, Senior Vice President, **Government Affairs**

The FCC has said that our members' compliance with the Do Not Call list has been overwhelming. Law-abiding marketers are doing what they

are supposed to under the law and this has dramatically decreased the number of consumer complaints fielded by regulatory agencies. At the same time, however, complaints about deceptive marketers – marketers who aren't following the law – are on the rise. These marketers did not follow the law before and they are not following it now. Additionally, the Do Not Call list has virtually wiped out all outbound telemarketing to prospects -- although the one notable exception to that are political outbound calls, since they are exempt from the list. There has been no change in effectiveness in terms of outbound calling of customers.

I would follow the Canadians' lead in terms of what they have done with their Do Not Call list and require consumers to register every three years. That way, the U.S. list would be cleaner, more relevant and up-to-date. Additionally, I would eliminate consumers' ability to sign up for the Do Not Call list via the Internet, as there is no way to verify a person's identity when registration takes place online. Indeed, I was a victim of Do Not Call list fraud when a prankster put my phone number on the list a few years ago. Lastly, I would eliminate all business, fax and 800 numbers from the list, as well as cell phone numbers, because marketers are prohibited from calling cell numbers anyway.

The federal list is done, for all intents and purposes, and the fees are now capped. Our hope is that the federal government will clean up the Do Not Call list and that there will be one national list so that the state-by-state, patchwork quilt approach will no longer exist.

InfoCision Management Corporation (www.infocision.com)

Steve Brubaker, Senior Vice President of **Corporate Affairs**

As far as InfoCision is concerned, we have grown our sales by more than 50 percent since the National Do Not Call Registry was implemented. The Registry left many commercial businesses to wade through a sea of new regulations and many Fortune 100 corporations turned to InfoCision to relieve them of the burden. InfoCision has always been focused on quality of service and has invested millions in customized proprietary compliance technology and staff resources—something many companies find almost impossible to do on their own. We have always taken the position that we, not our clients, are primarily responsible for ensuring the requirements of applicable state and federal laws are met.

One of the most important aspects of the DNC legislation that should be reconsidered is the ability of the FTC to verify that the person putting a phone number on the Do Not Call list is the appropriate and responsible party with the authority to add that number. As it stands now, anyone can add any phone number to the list without authentication. This was a misstep the government took in their rush to bring the list to market so quickly.

I really don't see the Do Not Call Registry expanding any further in scope, now that the FTC has made it so that phone numbers are permanently on the list. I can only hope that the FTC will begin a more diligent process in the hygiene of the list.

However, if you look at where the industry is going, there's quite a bit of movement, specifically in the area of self regulation. The American Teleservices Association's Self-Regulatory Organization (SRO) promotes proactive dialogue inside our teleservices community as well as with government regulators. The SRO allows the industry to tackle issue and develop solutions that would otherwise face government scrutiny.

New (and Controversial) Telemarketing Sales Rules Amendments

The FTC has issued new amendments to the Telemarketing Sales Rule (TSR ([News - Alert](#))) which appears to have resolved one issue, split the telemarketing industry over another, and may have made regulatory compliance even more challenging.

The key features are:

- * Pre-recorded telemarketing sales messages will not be allowed unless marketers have previously obtained recipients' signed written consent. Prior to this companies that had existing business relationships (EBRs) could use this method to telemarket to their customers
- * Predictive dialers cannot abandon more than three percent of calls over 30 days, from three percent per day
- * Pre-recorded calls must provide automated interactive opt-out beginning Dec. 1, 2008 while the signed consent is required as of Sept. 1, 2009. The abandonment rate change becomes effective Oct. 1, 2008

The telemarketing industry strongly supported the dialer abandonment calculation change as it harmonizes this TSR provision with that in the Telephone Consumer Protection Act (TCPA), administered by the FCC. The FCC uses the 30 day period.

The change will also make using predictive dialers more feasible for smaller campaigns and programs, such as for test markets and simplify managing outbound programs by avoiding having to find out which jurisdiction their clients fall under and adjusting their dialers accordingly.

"This [amendment] will be a plus for both consumers and marketers because it doesn't penalize marketers for using more targeted

call lists," says DMA Senior Vice President, Government Affairs Jerry Cerasale.

"Measuring the abandonment rate utilizing a three percent rate over a 30-day period will lower cost structures and significantly lessen compliance obstacles for contact center management," adds ATA CEO Tim Searcy.

The DMA is disappointed, though, with the FTC's move on pre-recorded calls, which it says will lead to higher prices.

"[We] had hoped that the FTC would match the FCC's position on this issue by enabling marketers to leave pre-recorded messages for consumers with whom they had a pre-established business relationship," states Cerasale. "Instead, the FTC has essentially left their old rule intact, and in doing so will increase the administrative costs for marketers: a practice that will increase the price of goods for consumers."

The ATA is, however, lukewarm to the issue. CEO Tim Searcy said that while the association has supported the EBR for pre-recorded messages, and that consumers should decide to receive such calls, it has never aggressive in pursuing this policy. One reason is that consumers were finding it increasingly difficult to judge the difference between legitimate EBR and fraudulent pre-recorded message calls.

"This was a non-starter for policy makers, and the ATA Board of Directors felt and feel that the EBR exemption would have continued a harmful image of the industry," explains Searcy.

Dean Garfinkel ([News - Alert](#)), CEO, of Call Compliance, Inc, which provides telemarketing compliance services, strongly supports the FTC move on pre-recorded dialers.

This rule change eliminates the ambiguity that existed with the EBR exemption on teleselling with this method. It is now clear that any dialer that delivers a pre-recorded message aimed at making a sale without the consumer's prior consent to receive such calls will be illegal.

He added that opting out of pre-recorded calls has proven difficult because of the nonexistence of either industry best practices or specific regulations for acknowledging the consumer wishes. In contrast to live calls where there is a reasonable expectation that when consumers tell an agent to put them on their do not call lists these wishes will be complied with.

"People are generally unnerved when they get calls from devices that they can't engage in a human conversation with," explains Garfinkel. "And when you annoy people they won't listen to you let alone buy from you."

Joseph Sanscrainte, a teleservices law expert and attorney with Bryan Cave LLP who drafted standards for the soon-to-be-unveiled ATA's Self-Regulatory project, does not see the pre-recording change per se harming telemarketers.

If anything the industry will benefit from it overall. By barring delivery of certain pre-recorded messages, rogue companies will move away from these much-derided tactics, allowing the industry to raise the standards for all calls.

"I don't see that there will necessarily be an overall drop in telemarketing calls," says Sanscrainte. "The companies that send pre-recorded calls to those consumers with whom they have EBRs will likely go to the next least expensive option, and that is to use live agents."

The TSR pre-recorded message change does pose, and points to, compliance hazards for telemarketers, the attorney points out. The FTC's new regulation conflicts with the TCPA, which permits prerecorded telemarketing calls with EBR. Industries not under the FTC's jurisdiction, therefore, may decide to follow the TCPA's more lenient standard.

Complicating matters further, the FCC rule, as with many other federal regulations, can be superseded by state regulations if they are stricter. For example, Arizona does not provide an EBR exemption to its pre-recorded telemarketing prohibitions. The same entities that benefit from the FTC's lack of jurisdiction over them would still have to avoid pre-recorded calls in Arizona, even with an EBR.

There are also details in the FTC regulations that can be confusing to implement. If a pre-recorded call "could be" answered by a consumer the message must contain an automated means to opt-out, says Sanscrainte. Yet if it "could be" picked up by an answering device then the message must have a telephone number for consumers to use to assert a do not call request.

The issue lies in that there is no way to be absolutely certain how pre-recorded calls are being handled at the other end. The FTC creates what appears to be, he says, an "either-or rule", but in practice, he asks, how will telemarketer's know ahead of time who or what 'could be' picking up the phone?

"Prerecorded telemarketing rules present a regulatory minefield because of all the jurisdictions that are out there and the ongoing changes in legislation that occur," explains Sanscrainte. "You have to tread very carefully in how you comply with them."



Customer Interaction Solutions TMC Labs Innovation Awards 2008

This is our ninth installment of the TMC Labs Innovation Awards recognizing the truly unique and innovative products and services within the contact center industry. TMC Labs proudly bestows a TMC Labs Innovation Award on 20 deserving winners. The results are published in two parts in order to accommodate our in-depth write-ups for the winners. The complete winners list appears in the September and the October issues. Writeups on Aplicor through Numara Software ([News - Alert](#)) were published in the September magazine. This month features descriptions of OAISYS through Toshiba.



OAISYS

Talkument
www.oaisys.com

OAISYS's Talkument is a voice documentation solution that documents telephone conversations through call recording and makes them available to individuals to store, organize, annotate and share with others. It centrally records telephone calls, giving secure access for users to view, search, playback, annotate, organize into folders and share with others via internal sharing technology through a single user interface.

The single rack-mountable 1U appliance unit is capable of interfacing with up to two digital trunk circuits or up to 48 PBX ([News - Alert](#)) endpoints using some form of IP recording (i.e. not digital / analog station tapping). Future enhancements will allow Talkument software included on a built-to-order server base system along with Tracer, their call center interaction management software. This configuration will be scalable to 192 ports per system.

Talkument's strength is the ability to organize, annotate and highlight specific sections of voice conversations, which can then easily be shared without sending recording files through e-mail and using server resources. Talkument enables a library of searchable, accessible content for the entire organization.

OAISYS explained, "Historically, the utilization of call recording has largely been relegated to call center environments, whether formal or informal. As a management tool, the primary benefits of this technology were employee monitoring, evaluation, training and also reduction of liability risk. Talku-

ment has re-invented the use of call recording to address a new business application—Voice Documentation." They added, "In the past, voice conversations and the valuable information they contained were left to vanish upon completion of a call. Bridging the gap between telephony and the desktop, Talkument facilitates accurate and efficient information transfer of voice interactions. What e-mail has done for letters and memos, Talkument does for phone calls, allowing for easier, more direct collaboration between co-workers, suppliers and clients."

Talkument utilizes a technology they call Portable Voice Document (PVD) which contains all information about a phone call, along with the audio recording and all comments that are added after the call, to be contained within one PVD file. Users can insert text annotations to further explain and clarify verbal content or to respond to a specific question within the voice document. Enhancing privacy and security, shared content can be set to expire and sharing restrictions can be included.

In the last six months, there have been improvements in Talkument including the ability to share only segments of a call with other users, a pop-up feature to notify users when someone shares a voice document with them, and recording triggers, which enable selective recording functionality.

Openet
FusionWorks Policy Manager
www.openet.com

FusionWorks Policy Manager enables providers to dynamically prioritize and control network traffic enabling service providers

to create and deliver new innovative and more personalized services. Policy Manager can also make traffic management decisions based on the time of day (busy hour) and/or application type to prioritize premium content over other applications when network capacity is highest to ensure subscribers are not negatively impacted. Policy Manager enables providers to control their networks in real-time based on subscriber, service, access network, location, time, quality of service (QoS) and other parameters. It utilizes an efficient multi-threaded rules engine with synchronous and asynchronous communications resulting in latency as low as 5 to 15 ms.

It features the ability for in-session policy decisions, which enables service providers to generate and deploy subscriber-centric policy controls. The service policy control enhances the customer experience through real-time service delivery and improved quality of service on a per-subscriber, per-session or per-application basis. Services that can be charged include parental controls based on content, duration, and other criteria, bandwidth tiers, and more. It supports service enablers and external OSS and BSS systems. It leverages an easy to use web-based graphical tools and monitoring dashboards. Built on Openet's ([News - Alert](#)) FusionWorks Platform, Policy Manager is compliant with 3GPP, 3GPP2, Cable Labs and WiMax Forum architectures and standards for policy and charging control, and leverages IP Multimedia Subsystem ([News - Alert](#)) (IMS) as a reference architecture. Service providers looking to monetize their networks and offer value-added services should check out this innovative solution.



Call Center Software Online Community

<http://call-center-software.tmcnet.com>

In today's complex global environment of new technology, product sourcing, and labor markets, Five9's call center software is at the forefront of accelerating call center performance.

The Call Center Software community addresses issues important to decision makers in the call center market. Visitors can find valuable resources such as free product trials, feature articles, white papers, industry news and free consultations.

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OAISYS	Talkument	www.oaisys.com
Openet	FusionWorks™ Policy Manager	www.openet.com
Premiere Global Services	Accounts Receivable Management	www.premiereglobal.com
Prosodie Interactive	Pro VACD 3.0	www.ivrinc.com
RingCentral	RingCentral 5.0	www.ringcentral.com
salesforce.com	Salesforce to Salesforce	www.salesforce.com
ShoreTel, Inc.	ShoreTel 8.0	www.shoretel.com
Siemens Enterprise Communications	HiPath ProCenter	www.siemensenterprise.com
Soffront Software, Inc.	Soffront CRM Version 8.7	www.soffront.com
Toshiba America Information Systems, Telecommunication Systems Division	Strata ACD IP Call Center Solution with Net Phone Presence	www.telecom.toshiba.com

Premiere Global Services Accounts Receivable Management www.premiereglobal.com

Call collections may not be the sexiest topic in contact centers, but it is critical technology component and crucial to the financial lifeblood of any business. Premiere Global's Accounts Receivable Management (ARM) solutions help to ensure a continuous supply of revenues by offering proactive communications solutions on their hosted platform. Premiere Global ([News - Alert](#)) is a hosting service provider whose platforms contain a variety of communication technologies including e-mail, SMS, automated speech recognition, Internet protocol (IP) fax, Web and audio conferencing, mobile and other technologies. Its Web portal PGiConnect.com enables customers to use the applications directly from their desktop or mobile device. Its ARM ([News - Alert](#)) functionality is powered by their Premiere Global Communications Operating System (PGICOS). It offers open standards access to these applications via its PremiereConnect API suite, enabling customers to integrate PGiCOS directly into their enterprise applications, such as ERP, CRM, and human resources systems.

One of the ARM solutions' claims to fame is how it can accelerate communications and payment at each stage of the billing cycle. For instance, for billing and invoicing you can use notifications to send bills and invoices to

customers faster; distribute bills via broadcast voice, email, fax or SMS message -- with options for voicemail and answering machines. Additionally, it features payment reminders to remind customers when payments are due or past due using reminder communications in the format your customers prefer. It also includes automated dunning activities to notify customers of the past due status of a bill or invoice. It also includes built-in automated payment features to help customers pay you faster without agent intervention. Further it features comprehensive profile and call management features customized to your specific needs and requirements. Importantly, Premiere Global offers Web-based reporting and analytics to track campaign effectiveness. Premiere Global complies with type II SAS ([News - Alert](#)) 70, HIPAA, GLBA, Sarbanes-Oxley, Safe Harbor, SB-1386, and similar regulations.

Messages are delivered over VoIP, SIP, and PSTN, and clients can connect to the Premiere Global Communications operating system using protocols such as SMTP, FTP(S), HTTP(S), and XML/SOAP 1.1. The platform's voice component supports transfer, authentication, barge-in, advanced scripting, call management, call pacing, recorded message detection and work-around, retry and resend, Whisper technology, and enhanced PAMD (positive answering machine detection). The system has call management features and can pace calls, in effect acting as a Web-based auto dialer. The company's

intelligent mass dialing network supports outbound campaigns without the need for additional hardware. Other features include advanced scripting, answering message detection, and whisper technology, which tells the operator who is on the line before actually connecting the call to the operator. Over the last six months, Premiere Global has enhanced its text-to-speech technology and customized call pacing features.

Prosodie Interactive Pro VACD 3.0 www.ivrinc.com

Prosodie Interactive offers a Virtual Automated Call Distributor called Pro VACD 3.0 which enables skills-based routing of inbound calls. They provide a virtual administrator and agent screen for real-time remote management. Their hosted service only requires a phone connection and a browser at the customer premise. All of the call routing is handled by VACD 3.0. Prosodie was one of the industry's first Virtual ACD solutions and uniquely they work very closely with their customers to customize and fulfill the client's specific needs.

Some powerful features include traffic over flow manager, online call detail search, a personalized view gate queue ticker; call recording and real-time call monitoring. Prosodie claims to be one of the first companies to take these features to market and provide contact center managers the tools necessary to manage a remote working organization.

Prosodie told TMC Labs, "Our consultative approach to our clients has been repeatedly validated as a major reason for our success." One innovative feature they explained to us - "We have a built in capacity buffer for our clients to utilize and they are only charged if they do so. This allows a company who averages a set amount of calls a day to compensate for a spike in traffic."

Benefits include the ability to handle peak periods & provide 24/7 service, increased efficiency, and the ability to seamlessly route calls to multiple contact centers & home based agents. Pro VACD 3.0 provides flexibility for agents to pick up and drop shift. Core features include call queuing and routing, skills-based call routing, prioritized call routing, DNIS assignment of agent groups, unlimited number of agent groups, toll free call answering, and custom messages created for each DNIS. Supervisory features for monitoring & evaluating agent/system performance is available, as well as dashboard display in real-time of agent/call data.



RingCentral RingCentral Online 5.0 www.ringcentral.com

RingCentral ([News - Alert](#)) Online is a hosted-PBX service that integrates PSTN, mobile, e-mail, voicemail, fax, SMS, VoIP and the Internet, employing patent-pending message synchronization algorithms as well as voice-chat and click-to-call technology. RingCentral targets small and home-based businesses, mobile "road warriors" and independent contractors to offer a comprehensive communications platform to help stay in touch with your customers and critical information.

RingCentral provides a complete virtual phone system for small businesses by integrating landline, VoIP, cellular, email, voice-mail and fax with a powerful web interface. RingCentral combines a toll-free or local number with advanced call management, PBX, voicemail and Internet fax, enabling customers to set up multiple extensions with voicemail, automatically screen, forward and place calls, take voicemail, send and receive faxes, and receive message alerts.

RingCentral's DigitalLine is their proprietary hosted VoIP service. You can assign DigitalLine to any extension in your account and use answering rules to route calls to DigitalLine phones according to day, time and Caller ID. A unified call log keeps track of all incoming and outgoing calls.

The enhanced Call Controller with SoftPhone enables you to answer and place calls directly from the PC, conference calling, and recording calls. The Call Controller application features screen pop-ups that includes a caller audio preview and caller ID, so users can screen before deciding how to handle the call. One very innovative feature is that subscribers can reply to callers by typing a message that is converted to audio using text-to-speech technology – which can also be played as a custom greeting for incoming calls. For missed or ignored calls, RingCentral also includes a feature that notifies users of their messages by phone, text or email. RingCentral features an easy to use web interface, enabling users to configure and manage their own virtual phone system, including extensions, a dial-by-name directory, call forwarding, auto call distribution, call screening and voicemail.

RingCentral also provides an auto attendant and extensions for individual employees, who have personalized dashboards to manage inbound calls. Each extension can be programmed with its individual call-forwarding

rules. The RingOut click-to-call out feature allows customers to return calls instantly or highlight a number on a Web page or application and click it to call. Another feature, RingMe is a click-to-call button that customers can embed within their Web sites and email signatures. RingCentral Fax is another powerful feature which includes a toll free or local fax number, which can receive faxes in a recipient's email inbox as well as in a customer's Web-based RingCentral account.

salesforce.com
Salesforce to Salesforce
www.salesforce.com

Salesforce to Salesforce, a 100 percent web SaaS application, was developed as a way for salesforce.com's customers to connect and share data with their partners on-demand. Salesforce.com proudly claims that this product has been coined the "Facebook™ of the Enterprise," a service that allows any two Salesforce customers to be able to securely connect and share information with zero integration required. With Salesforce to Salesforce, companies can choose which channel partners, (currently numbers 43,000 users) within the salesforce.com community, that they would like to share information with.

You can easily send invites and accept invitations to start sharing data immediately with suppliers, vendors, partners, and customers that also use Salesforce. Send branded e-mail invitations to business partners and set up trusted, secure data-sharing connections and once invitations are accepted, share data immediately. It features a customizable publishing model, allowing companies to opt in and decide what object types to share - leads, opportunities, accounts, contacts, tasks, or custom objects – providing users with a secure connection to share only the data that their business partners need. Companies can pick and choose - right to the field level - what updates they want to receive from connections. The process of selecting objects and fields to subscribe to is done with the simple click of a button, and requires no coding. Salesforce to Salesforce enables users to share data and collaborate on business-sensitive processes while simultaneously giving them real-time visibility into updates being performed by their partners, customers, and vendors.

Salesforce Ideas and Salesforce Content were added in the June Salesforce Summer '08 release. Salesforce Ideas enables customers to

tap into the innovative power of their customer, partner or employee communities by allowing them to post, discuss, and vote on ideas. Salesforce Content allows companies to securely share, manage, and collaborate on business content such as documents and presentations. Salesforce.com explained it best when they told us, "With Salesforce Ideas, companies can leverage the knowledge and expertise of their partners in designing better products, providing better services and making better decisions overall. With Salesforce Content, companies can tag ([News - Alert](#)) relevant information for their partners, such as marketing documents or sales sheets, helping them to filter through the most current and relevant content for their partners. These features empower Salesforce to Salesforce customers to work more closely and securely with any company or group they do business with: partners, suppliers, resellers, vendors, distributors, agents, brokers, or customers. This ultimately builds the foundation for strengthening their business relationships, generating more value from the information being shared and opening the lines of communication within the channel partner network."

ShoreTel, Inc.
ShoreTel 8.0
www.shoretel.com

ShoreTel ([News - Alert](#)) is an early VoIP pioneers and one of the first to offer an IP-based PBX. ShoreTel 8.0 enables companies to seamlessly integrate all communications-voice, data, messaging-with their business processes. ShoreTel's features a distributed software architecture that scales seamlessly from 1 to 10,000 users including PBX, voice mail, and automated attendant functions.

ShoreTel 8.0 now enables users to integrate all forms of communication, including video, with business processes. In release 8.0, Unified Communications ([News - Alert](#)) (UC) capabilities are greatly enhanced, offering streamlined business communications and more intuitive access to fully integrated voice, instant messaging, e-mail and video. ShoreWare Call Manager's desktop user interface offers tabbed windows that make users more productive by making it easier to access voicemail, call history, directories and the speed dial list. ShoreTel's new ShoreWare Professional Call Manager supports easy-to-use, high-quality video: up to 640x480 resolution and up to 30 frames per second. The Professional Call Manager also provides presence information and consolidates instant messaging with voice, video and



e-mail for a true unified communications experience. Call Manager is a fully-featured softphone which allows users to make or receive calls from their PC or laptop.

ShoreTel's UC system also now includes built-in support for SIP endpoints, devices, and applications that comply with RFC 326, giving customers flexibility and choice in what SIP devices their businesses require. ShoreTel claims to be the first leading unified communications vendor to deliver a product that takes advantage of the most recent enhancement to the H.264 standard for video compression: Scalable Video Coding (SVC), enabling high-quality desktop video. For redundancy, ShoreTel uses an N+1 model for the ShoreTel voice switches.

Additional applications and features include Legal & Professional Cost Recovery Application as well as E911 Notification Application. E911 Notification Application supplements the native E911 support built into the ShoreTel system. This application provides site administrators with an extra level of oversight and security by automatically alerting them with audible desktop screen pops and by placing notification calls to all configured phone numbers when a 911 event is detected on the ShoreTel system. Other innovative features include a Microsoft Dynamics CRM Integration application, ShoreTel NetSuite Integration application, ShoreTel Salesforce.com Call Center Adapter, and the ShoreTel Web Dialer Application.

Siemens Enterprise Communications (News - Alert)
HiPath ProCenter
www.siemensenterprise.com

Siemens HiPath ProCenter Enterprise represents their core solution in the OpenScape Contact Center portfolio. The portfolio of solutions, all based on a single code base targets contact centers ranging from 10 to 7,500 active agents giving Siemens (News - Alert) a broad market reach. The Siemens HiPath ProCenter Enterprise solution includes intelligent routing, full multimedia automatic call distribution, historical and real-time reporting desktop tools for managers and supervisors, agent desktop applications with screen-pop, presence and collaboration capabilities. A complete Software Developers Toolkit (SDK) is available and Siemens offers published, open interfaces for extensive integration with third party solutions.

Siemens owns the patent for their innovative skills based routing, which was first patented by Siemens in the early 1990s, known as ResumeRouting, and includes a unique algorithm that drives calls to unique skill sets and skill levels on a per agent profile basis based on dynamic virtual groups and call-by-call queuing with predictive capabilities for all media types. The solution is also based on 3rd party CTI-based call control functionality. The solution is built on a SOA-based architecture and offers open virtualized contact center functionality.

The platform features strong presence capabilities enabling agents to assist with various customer interactions including voice, email, Web chats, and more. Additionally, support for Jabber and Same-time instant messaging is available. Unified communications and a standards-based approach is at the very core of Siemens offering. Siemens told us, "At Siemens we believe that incorporating the breadth of Unified Communications capabilities as part of the matrix of core contact center offerings will drive even greater achievements in improved customer satisfaction, higher FCR and simultaneously drive lower total cost of ownership for our customers while delivering the most rapid ROI – a unique position in the industry."

Desktop tools can be used for real-time monitoring, quality control, workforce optimization, improved workflow and performance reporting along with advanced multi-media and UC capabilities. The desktop Design Manager is a graphical user interface that allows contact center customers to control their call flows and multimedia designs, which can be done on the fly. The Agent Desktop application features screen-pop of contact details for all media types, real-time PC-wallboard display, tear-off and park toolbars and customization by the user, built-in presence and collaboration features, and personal performance statistics.

Soffront Software, Inc.
Soffront CRM Version 8.7
www.soffront.com

Soffront Software targets mid-size businesses with their mid-market CRM product called Soffront CRM Version 8.7, a hosted or customer premise offering which features sales automation, marketing automation, customer service, knowledge base, order processing, help desk, defect tracking, project management and more. The Soffront CRM application is completely web-based and can be deployed very quickly.

Soffront includes an innovative built in code generator to generate codes from customer's specification of forms using a visual form designer. A completely WYSIWIG web-based CRM form designer makes development very easy. You have the ability to delete database fields, tables, and forms (in addition to hiding them from user). It also features a two-dimensional user configurable CRM matrix reports for "what if" analysis. A fully automated campaign engine with the ability to schedule campaign execution is included.

Soffront told TMC Labs, "Soffront has been the first to offer zero footprint web clients, first to introduce web based form designers, form code generators, web based scripting options, graphical workflow editors, CRM business automation rule engines, configurable CRM Portals. The new version 8.7 takes CRM automation to new heights with its fully configurable web-based automation rules engine, completely minimizing the need for scripting."

Soffront also provides a point and click visual SQL query builder that does not require the knowledge of SQL language to build very complex queries joining multiple tables. Soffront report engine is very powerful allowing users to create numerous types of text, graphical, funnel and Gantt charts. Soffront 8.7 the latest version adds multi-currency support, enhanced calendaring and group scheduling, recurring activities and opportunities, new email enhancements, and Google Maps integration.

Toshiba America Information Systems, Telecommunication Systems Division
Strata ACD IP Call Center Solution with Net Phone Presence
www.telecom.toshiba.com

Toshiba's (News - Alert) Strata ACD is an IP call center solution designed for small- to medium-sized enterprises or larger corporate users with multiple sites. Available with Toshiba's new Net Phone 6.0, it offers a host of Presence features that deliver powerful presence capabilities for call center agents, supervisors, and other users. It is compatible with Toshiba's Strata CIX IP family of business communication solutions. The Net Phone 6.0



features include a Presence Viewer and an ACD Viewer that shows real-time status of the Call Center, including phone status (idle, busy, or do not disturb), status message (shows status set by Net Phone such as canned such as 'in meeting,' as well as text entered by the user), chat status (shows if Net Phone is launched and agent is online to accept chat requests). Further, you can click to initiate a call or request chat with agents. Collaboration tools including Chat and/or Whiteboard, implemented directly from the Presence window.

The platform supports an optional built-in VoIP softphone. Strata CIX IP Mobility compatibility allows users to switch from the Net Phone VoIP to the IP telephone or the SoftIPT soft phone on a laptop computer. The voice connection is changed to the selected telephone, while the Net Phone can still provide the screen pop and control the telephone. It offers screen pop, and desktop call control such as drag and drop transfer and conference capabilities. Importantly, it offers personal call handling rules so users are contacted how and when they wish. Advanced call routing is available to direct calls based on caller ID, account numbers, private lists, balanced call count, preferred agent treatment, agent priority, time-of-day, day-of-week, day-of-year, and user-entered data.

Other powerful features include skills-based routing, priority queuing, and the ability to inform callers of their place in the queue or estimated time before answer, as well as offering alternative actions such as going to voice mail or a call back. IVR Voice Assistant gathers and validates caller input, triggers responses, and can alert agents when queue is overloaded. Call Recording and Logging enables calls to be recorded, stored, organized, searched and played back.

Toshiba Strata ACD resides on the Toshiba Strata Media Application Server (MAS), which integrates all ACD and reporting, voice mail/unified messaging, IVR, text-to-speech, speech recognition, video conferencing/collaboration, CRM, and other value-added applications and capabilities on a single integrated platform. This integrated approach reduces the TCO and mitigates any integration

issues that plague multiple server or multiple vendor solutions.

Toshiba explained, "One of the reasons Toshiba's Strata ACD application can run so efficiently on a Media Application Server

concurrently with other applications is the use of Host Media Processing (HMP) technology. This not only provides processing efficiency but eliminates the need to use expensive Dialogic (News - Alert) voice boards in the server, providing additional cost savings."

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By Joe Fleischer



Beyond the Numbers Game

What companies can learn from call centers about workforce optimization.

When you encounter a phrase like “workforce optimization,” it’s understandable if your first impulse is to dismiss the term. The idea of optimizing something as abstract as a workforce seems to come from a mindset that perceives call center agents only as units of labor. But in practice, we don’t aim to optimize agents. Instead, we aim to optimize how agents use their time.

For a call center, the ability of agents to manage their time has greater implications than whether agents follow their schedules. Call center managers expect that, at a minimum, agents are available to assist customers. But agents’ schedules don’t revolve entirely around work. Many agents seek employment in call centers so that they can have flexibility outside work. Like call center managers, agents have expectations. At a minimum, agents want their employers to recognize the circumstances when they are most productive. For call centers, the cost of not offering flexible schedules is turnover.

Call center agents are not the only members of the workforce who choose what they do for a living based on how well-equipped their employers are to accommodate their schedules. To offer sufficient flexibility to attract and retain people who are most effective at serving customers, companies are looking to call centers for guidance.

For a call center to be more than a factory, it has to set aside, rather than dictate, time agents devote to improving their service to customers.

As I and some of my colleagues in the call center field have observed, bank branches and retail stores are starting to use many of the same scheduling software tools that call centers have relied on for years. I suspect that one reason companies have broadened their use of scheduling software is that as call centers receive greater attention and earn greater influence within their organizations, so too do the types of tools call centers depend on.

Consider the variables that call centers take into account when they schedule agents. These variables include the reasons that customers call, the skills that enable agents to fulfill customers’ most typical requests and the level of proficiency agents demonstrate with each skill. It’s hardly surprising that when you schedule people who serve customers in retail operations, you come across variables that are similar to those you encounter when you schedule agents in call centers. That’s because in terms of their functions, call centers have often replaced or served as adjuncts to retail operations, such as walk-in payment centers.

But a reverse trend, especially with banks, is that retail sites are emerging as adjuncts to call centers. When a company recognizes that its customer service staff spans a continuum of care, then it has an opportunity to achieve economies of scale by managing schedules not only for call center agents, but for all employees who serve customers. Beyond the realm of customer service, companies can apply call centers’ scheduling techniques to assign back-office work, like programming or accounting, to correspond to different projects or constituents. In effect, companies can learn from call centers how to manage employees’ time and determine their priorities.

The problem is that if we think only in these terms, then we run the risk of defining employees, as we noted earlier, only as units of labor. Scheduling people is more than a numbers game. When companies evaluate agents on the basis of how much time they communicate with customers, they convey an inadvertent lesson

that the quantity of time matters more than the quality of agents’ service. For a call center to be more than a factory, it has to set aside, rather than dictate, time agents devote to improving their service to customers.

One of the advantages of using scheduling software both within and beyond call centers is that these tools enable agents to dedicate time to perfecting their craft.

For years, scheduling software has enabled call centers to come up with a variety of scenarios for how they train and evaluate agents without sacrificing their overall responsiveness to customers.

There is much that various types of organizations can learn from the way call centers optimize their employees’ time. First, call centers use workforce management tools, which give them the flexibility to hire people whose schedules other workplaces haven’t yet figured out how to accommodate. Second, call centers are adept at setting aside the time employees need away from customers, such as time for coaching, so that employees continually learn how to serve customers better. Third, and most important, because call centers help agents use their time most efficiently when they’re at work, they enable agents to devote time to aspects of their lives that matter far more.

*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*.*



Speech Analytics Market Experiencing Strong Growth

DMG Consulting LLC, a provider of contact center and real-time analytics research, market analysis, business strategy, operations and technology consulting services, has published the 2008 Speech Analytics Market Report. A comprehensive and timely guide to this growing market, this report examines this technology and its impact on the market and customers.

According to this report, the speech analytics market grew by a significant 106 percent in 2007, producing a four-year compounded annual growth rate (CAGR) of 268 percent.

DMG has forecasted continued market expansion at a rate of 70 percent in 2008 and 50 percent in 2009, regardless of the challenging economic conditions. The market is growing rapidly and there are now 22 competitors as well as many new entrants that are planning to introduce solutions within the next few months.

A great deal of attention has been placed on speech analytics as it has a proven ability to provide enterprises with insights into customer needs and wants. This ability is translating into significant productivity savings for contact centers, as well as increased customer retention and revenue for enterprises.

"The incredible growth in speech analytics usage is evidence of the growing realization that enterprises need more insight into their customers' preferences and behavior," says Donna Fluss, president of DMG Consulting, in a company statement.

"A better understanding of customer behavior will help enterprises enhance the customer experience and improve customer loyalty. Speech analytics solutions deliver quantifiable benefits that improve productivity, customer retention and loyalty, yielding one of the more rapid and compelling ROIs among contact center applications."

Contact centers are growing in importance for organizations around the world as customers are demanding more in terms of customer service. The challenge is that these centers also cost money and in slower economic times, the organization must be able to extract more from this division than just customer service deliverables.

Speech analytics is one area where the contact center can maximize its current systems to gather valuable customer information to drive up-sell and cross-sell opportunities, as well as delivering a better quality customer service experience. In doing so, the contact center can drive customer retention and long-term revenues.

This report from DMG Consulting features detailed information about the market, vendors, technology, products, capabilities, current and future uses, trends, competitive landscape, benefits and ROI, market share and pricing. It also offers customer satisfaction scores and feedback about the vendors and their products.

The assessment also includes an in-depth analysis of all eight primary analytics solution providers: Autonomy etalk, CallMiner ([News - Alert](#)), eLoyalty, Nexidia, NICE Systems, SER, UTOPIA, and Verint Systems.

Study Shows Contact Centers Not Properly Aligned with Web Sites

With the proliferation of the Internet, consumers have discovered the ease and fun of shopping online. No longer is it necessary to burn gas and precious time to find the latest fashions, food or device. Consumers only need a way to connect to the Web.

The result of this influx in eCommerce is not all roses, however as recent research has shown that adults are experiencing problems completing transactions online. For a channel that can serve as an excellent deflection of contact center traffic, the reality is that many contact center agents are now busy trying to defuse frustrated consumers.

Yet the results of the 4th annual survey of online consumer behavior conducted by Harris Interactive ([News - Alert](#)) for Tealeaf found that nearly 9 out of 10 online adults in the UK who have conducted an online transaction in the past year have experienced problems doing so.

Another 41 percent of online adults who experience problems transacting reported that they would switch to a competitor or abandon a transaction entirely if they experienced an online transaction problem. In addition, four in five online adults who experienced problems — or 84 percent — share their experiences

with others both online and offline.

This represents a \$57 billion potential impact to revenue on shopping sites alone, which is a huge opportunity for companies to harness, simply by ensuring their websites work.

A recent Forrester Research report cited that 91 percent of business decision-makers revealed that customer experience is either very important or critical to their 2008 efforts.

While customer service is increasingly important to businesses, this survey highlights that companies need to take immediate steps to ensure they understand the experience of their customers who are transacting online.

These studies have highlighted that there is a lack of integration between the contact center and Web channels of these businesses. The survey found that 47 percent of all online adults have contacted a company's call center after

they encountered problems using the Web site.

Of these individuals, 64 percent did not feel that the service agent was knowledgeable about the Web site and nearly two in five — or 38 percent — did not have their issue resolved.

Results have also shown that among these online adults who have experienced poor customer service from a company's call center when calling about Web site issues, nearly 72 percent either stopped doing business with that company entirely at 45 percent, decreased the amount of business they do with the company at 37 percent.

"Businesses must take definitive steps to differentiate themselves by understanding and improving their customers' site experiences, and equipping their contact centers to truly meet the needs of online customers, said Rebecca Ward, CEO of Tealeaf, in a company statement.



By Joshua Shale,
Director of Marketing,
VoltDelta

From The Hosted Speech Experts

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

Hosted 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 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 (News - Alert) 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

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, 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 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 (News - Alert) is editorial director at TMC.

VoltDelta Hosted Solutions



Introducing... OASIS

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Speech Enabled
Conferencing
Alerting
Response Capture
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Verification
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OASIS Web Station

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Functionality
Agent Browser
Softphone
CRM Integration
RTA & Historical
Reporting
Agent Management
Multi-Channel

Universal Routing

Virtual Queue
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Voice Automation

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Top Ten Ways to Reduce Contact Center Costs While Improving Service

Contact centers are almost always under cost scrutiny, especially during slow economic periods, as the responsibilities they are charged with are still seen by many organizations as peripheral to their core functions.

Yet unlike in the past, most senior executives now have a growing understanding of the value of contact centers provide, namely helping them to retain customers and their revenues and support. The challenge then becomes what are the best ways to reduce contact center costs and to keep existing and to attract new customers.

So we put that question, as a Top Ten, to several leading firms. While some have responded with ten items others have replied with less, but all of them have insight that could help your contact center thrive and grow including in difficult times.

Aspect (www.aspect.com)

Serge Hyppolite, Director of Interaction Management

1) Unified Solutions

Unified solutions help contact centers reduce costs because IT won't have to integrate a number of siloed applications, which requires a lot of time and effort. Additionally, contact centers will save on implementation, administration, and reporting costs, and then later maintenance costs because all the applications are on a single platform: it's easier and quicker to pinpoint the source of the problem and fix it quickly. In addition, contact center managers won't have to spend time configuring multiple systems each time a new agent is added or leaves the company. With a unified solution, contact centers also lower operating costs because agents won't lose productivity when they are logging in and out of disparate systems all day long.

Ultimately, the benefit of a unified solution is a seamless experience for the customer regardless of the channel they're using for contact. For example, an outbound collections reminder can be easily turned into an inbound call where the

customer makes a promise to pay to the speech self-service system or directly with an agent.

2) Unified Communications

Unified communications, when deployed correctly and with the right portfolio of solutions, can result in a number of benefits for all types of organizations, from multinational corporations to single site small businesses. A unified communications strategy can take the guesswork out of operations by creating and implementing clear, streamlined processes that have a direct impact on the bottom line. Unified communications can have a profound impact on activities such as a simplified contract-to-order process; the elimination of time-consuming tasks in the purchase of materials; and cutting, even completely eliminating, order rejections. And not only do these streamlined processes result in lower costs, but also can create an improved customer experience.

Businesses and consumers both gain when knowledge workers can be part of the enterprise pool of customer-facing employee to best address consumer demands. High-value sales or service interactions can be addressed directly by the appropriate employee – no matter their location – based on availability, to provide the high level of customer service that result in the elusive ideal customer experience.

3) eLearning

Too often contact centers are trying to use the wrong tool to get training to the agents. It's simply too expensive to provide instructor-led training or team huddles, so it's vital that training be done at the desktop. Unfortunately, most corporate learning management solutions don't work in the contact center because training still has to be scheduled and is often cancelled based on service levels.



Superior performing contact centers today leverage eLearning to change training by pushing up to 80 percent of ongoing training content and 100 percent of the communications content to the agents' desktop. This enables adult learning and reduces the training costs and risks of training and also improves agent adoption of knowledge and skills. This helps companies overcome the difficult task of improving agent skills, ultimately enabling contact centers to deliver improved customer service, collections and sales.

CB Richard Ellis (www.cbre.com)

Mark Seeley, Managing Director, Labor Analytics Group

1) Relocate to lower cost labor markets. Labor makes up nearly 80 percent of a contact center's overall operating costs, is by far the low hanging fruit when it comes to cost savings.

By relocating a 500-agent contact center to a new labor market that is just \$1.00/hr less, the cost savings equal over half a million dollars per year, per shift.

2) Operate in areas with little or no employment competition. As many are aware, competition for employees drives wages and turnover rates up. By locating in a market or sub-market with low competitive pressure, call centers can save significantly, reducing payroll and attrition costs.

3) Source labor markets that have the right demographic and skill make-up. Labor markets that better support a call center's specific skill and educational needs translate to a higher performing employment base.

4) Recruit strategically (i.e. target market). Targeted recruiting methods reduce recruitment costs, as well as lower turnover, by improving the applicant to hire ratio and sourcing applicants that are a better fit for the job.



5) Refine the screening process. Reduce your 90-day churn rate by better educating applicants about the job before they are hired by conducting caller simulation and pre-employment orientation programs

6) Improve training programs. Properly preparing agents for the job reduces stress and, as a result, turnover. It also improves performance

7) Take advantage of economic development opportunities. Municipal, county, state and federal programs are available, even if you are not relocating to a new location. Make sure you are taking advantage of any available programs that can reduce training and recruitment costs, as well as income and real estate taxes

8) Source lower cost real estate markets. Not surprisingly, low cost labor markets often go hand-in-hand with low cost real estate markets. Real estate costs typically make up 10 percent – 15 percent of a contact center's overall operating costs

9) Also, locate near your labor base to increase applicant flow and reduce employee transport

tation costs. As gas prices rise, contact centers are experiencing higher turnover and more challenges recruiting when the facility is not proximate to the labor base

10) Implement a home agent strategy. Do away with your real estate portfolio altogether (or at least a portion of it), by implementing a work-at-home program

Convergys (News - Alert)
(www.convergys.com)

Mike Cholak, Vice President,
Global Consulting Services

1) Incorporate the "voice of the customer" into strategic decision-making by implementing a robust customer satisfaction survey program that includes access to real-time information

2) Use satisfaction results to understand which agent behaviors have the greatest impact on the customer experience, and focus there

3) Design and implement accountability support structures at the agent and manager levels using critical agent skills as a key performance indicator (KPI)

4) Include customer satisfaction metrics in scorecards, and report out at four levels: Agent, manager, site and account

5) Realign the focus of coaching and training to ensure agent behaviors critical to driving customer satisfaction that are central to ongoing efforts, and provide the tools to be successful

6) Develop a customer experience "map" to understand what the customer experiences after they call the 800 number, and proactively identify account, product and/or call processes that hinder achievement of the satisfaction goals

7) Conduct a segmentation analysis on the agent population to group agents into distinct categories (e.g., "Elite" versus "Laggards") based on satisfaction performance

8) Calibrate quality assurance scores to agent segments to check alignment and ensure that agents are coached to consistent behaviors

9) Establish a sub-group of agents empowered to handle less complex contacts on the first call, and proactively route customer contacts to this group

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10) Apply the principles of performance management to aggressively move the lowest performing agents off the floor and replace them with new hires

Enkata (www.enkata.com)

Liz Amaral, Director of Contact Center Product Marketing

- 1) Understand why customers call. Before you can attack the issues driving up service costs, you need a clear picture of why your customers contact you. Most companies rely on inaccurate methods or sampling strategies that can distort the picture. Find out what's in that "Other" category to start targeting cost drivers
- 2) Move the right calls to self-service. How many calls should be handled in a lower cost self-service channel? Do customers know about these channels? Are your self-service channels truly meeting customer needs? Answer these questions, guide your agents to educate customers and address any gaps in your self-service options to reduce unnecessary incoming calls
- 3) Eliminate unnecessary repeat calls. In a typical contact center, over 30 percent of all calls are repeat calls that could have been avoided. Do you know which ones? Measure First Call Resolution (FCR) accurately for 100 percent of calls at a call mix level to identify those calls that can be prevented in the future. Then implement a program that includes setting clear goals for your agents and then holding them personally accountable for issue resolution
- 4) Manage to a new definition of success. Your agents need to understand the importance of both excellent service and keeping calls to an acceptable length. Make sure their scorecards are aligned to your corporate goals by creating a balanced view of productivity and quality of service metrics
- 5) Use peer rankings to motivate excellence. Every agent believes that they are performing above average unless given facts to show otherwise. Providing daily peer comparisons on cost and quality metrics empowers agents to develop their skills and seek help when needed
- 6) Establish a formalized coaching program. If your supervisors are spending less than 50% of their time coaching agents, you're missing your best opportunity to increase agent efficiency and effectiveness. Hold supervisors accountable to coaching targets and remove the administrative work that gets in their way
- 7) Coach your agents based on facts, not aggregates. Every agent has a unique set of strengths and weaknesses. Why coach based on an average? If you can identify individual performance challenges at a granular level, backed up by the specific calls that led to poor performance, your supervisors can make coaching sessions constructive and productive
- 8) Reward your agents based on a new definition of success. Regardless of how you are measuring and coaching agents, if the same balance is not reflected in your incentive programs you won't see the desired impact. For example, if you introduce FCR as in important initiative, you need to make sure agents are recognized for improving their resolution rate
- 9) Identify corporate roadblocks to eliminate inefficiencies. You know that certain policies and procedures interfere with service delivery goals and drive up average handle time or call count. Use root cause analysis to shine a light on the broken processes that can be fixed to streamline call handling and improve the customer experience
- 10) Sell when the time is right. Tacking on a canned sales pitch to the end of every call is a sure fire way to drive up costs and drive down customer

satisfaction. Provide agents with real-time directives on what to offer and when, increasing the relevance to the customer and the likelihood of success

Infor (www.infor.com)

Tony Compton, Director of Product Marketing

- 1) Self-experience. Place yourself in your customers' shoes and call your 800 number. Call more than once to gain a true perspective. Interact with your contact center and experience what a customer does. If your experience is positive, your customers are more likely to enjoy their experience, leading to an increase in wallet share
- 2) Itemize the gaps in your call center's performance for immediate evaluation
- 3) Scrutinize how your call center supports your organization's overall CRM initiatives
- 4) Ensure your workforce is properly aligned with your contact center's goals and has the required skill sets to provide effective customer interactions that encourage loyalty
- 5) Align technology with personnel. Every contact center is different and supports varying missions. In many instances, companies will align either technology or staff with goals but not both. Make sure your staff and technology are in synch and support each other's success
- 6) Trust the system. Advancements in technology have led to complex algorithms that can provide highly accurate offer recommendations based on a customer's interaction history and profile
- 7) Singularity. Ensure your staff has access to all relevant information at all times. It does not help if an agent must send a customer, or prospect, to another holding cue to learn about additional services your company offers. Provide agents access to, and training for, cross-sell opportunities
- 8) Be smart with your data. Today's contact center's are a wealth of information; capturing every detail about each customer. Identify the types of information you gather and ensure the data aligns with your CRM goals and determine how you can best use the information to encourage offer acceptance
- 9) Succession planning and training. The industry's 20 percent turnover rate leaves frequent gaps in the workforce forcing companies to rely on under trained, green agents. The high turnover often leads to inconsistent customer interactions and poor service. Keep your staff trained, encourage participation and feedback and plan ahead for turnover
- 10) Update your measurement. Calls per hour and service requests per shift limit the effectiveness of agents to generate revenue. Benchmarks have evolved to focus on revenue per hour or services sold in a shift where the focus is on bottom line metrics to determine the effectiveness and success of an agent

Interactive Intelligence (www.inin.com)

Christine Holley, Director of Market Communications

- 1) Incorporate self-service options. Call centers have used self-service features such as IVR for years. Increasingly, they're adding Web-based and other modes of self-service, such as speech-enabled IVR. Whatever type of self-service option a call center offers, the key to reducing costs while improving service lies in how it's applied and to what. Generally speaking, self-service options offer the greatest reduction in costs when applied to simple transactions, such as updating an address or checking a flight time



2) Optimize staffing. Workforce management (WFM) enables more accurate staffing needs projection and alerts supervisors when inbound demand slows so they can re-allocate or reduce staff. Call centers should look for systems that are pre-integrated with the ACD so they receive accurate and real-time data that helps them plan schedules and make changes on-the-fly, and which can create schedule simulations. The systems should include real-time adherence with instant notification of compliance issues to permit immediate action on irregularities

3) Deploy outbound/blended technology. This allows instant reallocation of inbound to outbound agents that can reduce costs and create demand when business is slow. Automated outbound IVR is a cost-effective way to improve customer service while avoiding inbound calls by notifying customers ahead of time, such as the power will be turned off during a certain time of day for repairs

4) Accommodate remote agents: Increasingly call centers are considering transitioning agents to a home-based model. The drivers include cost savings based on lower overhead and turnover rates compared to in-office agents and improved customer service. For instance, remote agents are typically more amenable to working after hours, which enable call centers to more easily provide extended service hours. By being able to select from a larger labor pool (not constrained by geography) call centers have a better chance of securing skill-sets that they require. Remote agents also provide business continuity should the contact center "go off line," thereby minimizing service interruptions. The technologies to support remote agents are mature and widely available. There are IP-based systems with full functionality that enable remote agents using a PC or regular phone to perform call control, including call recording; access databases; view the presence of other agents; and even receive online coaching and monitoring from a supervisor

5) Consider Software as a Service (SaaS). SaaS can be a wise choice when companies would rather hold off on major capital expenditures. Small and mid-size businesses (SMBs) and large organizations with departmentally-focused initiatives are often good fits for SaaS. To ensure the cost savings of this model don't sacrifice customer service, call centers should look for vendors that have successful track records developing software, such as multi-channel routing, blended dialing and Web self-service. SaaS solutions should enable switching to a premise-based or even combined hosted and on-premise solution without re-writing applications

6) Focus on quality monitoring beyond productivity measures. Call centers have traditionally focused on measures such as agent talk time and speed-to-answer to evaluate quality. To take customer service to the next level, call centers should also focus on measurements that capture "the voice of the customer." Examples include automated post-call satisfaction surveys and speech analytics technologies such as emotion detection, which monitors calls in real-time to detect heightened states of emotion in order to improve customer satisfaction and agent effectiveness

7) Evaluate new models for communications-enabled business processes. They can result in soft ROI, such as increased productivity. For demonstrable cost savings, however, call centers should be aware of new business process automation (BPA) platforms that not only launch the call that a BPA system might trigger but also leverage functions such as presence, VoIP, queuing and routing to automate that process in the first place

(8-10) The final three ways call centers can reduce costs while improving customer service are adopting standards-based, single-platform software 'suites'. They meet three architectural criteria – open, single-platform and all-software – are the foundation for call centers to cost-effectively provide optimal customer service. This enables call centers to quickly and easily create and modify applications to adapt to conditions the future brings. The cost savings alone are compelling; based on a recent BenchmarkPortal [News - Alert](#)) report the total annualized cost per agent for software-based, all-in-one solutions averages less than half that of multi-point solutions

West Interactive (www.westinteractive.com)

Bruce Pollock, Vice President, Products & Services

1) Integrate database services from across the enterprise. Bring together all relevant data from across the company for a 360° view of the customer. Not only does this enable the contact center to deliver the optimal response to customers' needs, it can improve productivity, reduce average call length, and increase cross- and up-selling revenue

2) Leverage unified communications. By taking advantage of the power of open systems to integrate data and voice management, companies can cut telecommunications costs while opening the door for an entirely new level of service. For instance, multichannel and multimedia capabilities available through IP technology can be utilized for greater responsiveness, productivity, and customer satisfaction

3) Proactively connect with your customer. Proactive communication can reduce calls to the contact center while building a long-term relationship with the customer. One of the best ways to differentiate yourself is to focus on the end-user. Customers want to transact with you more effectively. Make the customer experience seamless by applying ease of use methods that deliver needed information with quality and speed. Delivering information ahead of customer requests will reduce inbound calls and enhance the customer experience

4) Recognize, track, and learn customer needs. Make strategic use of customer service surveys for happier customers, greater revenue, and cost savings. Capturing and applying customer data in a real-time environment delivers more efficiency, reduced call time and increased first-call resolution. The customer also feels the information is personalized and you are ready to provide answers to their questions

5) Create customer-centric self service and self help. Customers want to interact in the most effective way with your company. Employ customer-oriented self service to maximize satisfaction and reduce calls to live agents. Companies can experience reduced costs by improving the performance of its speech applications, while offering a more personalized self-service experience

6) Create a true multi-channel experience. Take advantage of consumers' increasing willingness and preference for channels such as SMS or Web to deliver a competitive differentiation as well as to lower phone costs. Integrate all channels and ensure an excellent experience in all supported channels for a competitive differentiator

7) Turn to hosted services. For economies of scale, hosted services offer access to best-of-breed technology while reducing upfront and ongoing infrastructure costs. Boost contact center performance while reducing IT maintenance costs



My Top Ten

The fall is when one harvests what has been sown and grown. It is appropriate, therefore that we reap the insight and knowledge gained from managing customer interactions via contact centers with the 'Top Ten Ways to Reduce Call [Contact] Center Costs While Improving Service'.

Here's my Top Ten based on observations and reports:

- 1) Take a fresh look at automated speech recognition (ASR). As demonstrated by JetBlue in the September issue, ASR is more affordable and practical than you may believe. It is also the only viable self-service solution for interacting with customers and employees who are driving
 - 2) Make your Web site truly customer friendly with clear designs and easy, intuitive navigations. Meet the needs of those who are accessing your products and services while on the go with mobile-friendly or separate mobile-sites. Tap into the new automated chat technologies that emulate the bricks-and-mortar customer service experience at lower cost
 - 3) Go home and stay there. There is no reason why contact center agents and supervisors need to be warehoused in organization-subsidized offices. All of the inhibiting issues surrounding home-based agents: recruiting/screening, training, voice/data connectivity, monitoring, quality, scheduling, day-to-day management and teamwork, and security, have been resolved.
- Requiring staff to commute shrinks their budgets and yours, limits labor markets, and adds to traffic congestion, pollution, and healthcare costs. In contrast, home working saves money, increases productivity, reaches a much larger employment market, lowers turnover and sick days, supplies business continuity, and results in better service along with a cleaner environment
- 4) Go hosted. There are increasingly fewer reasons why contact centers need to sink huge sums for customer premises solutions (CPS), both hardware and software, along with the computers and the wiring and real estate they occupy, plus the heavy IT support. Hosted solutions now offer comparable if not better performance to CPS with greater flexibility, faster upgrades to newest versions, and increased security without the investments and the expenses
 - 5) Focus on customer-important quality metrics like first call resolution (FCR) and on customer retention. Track and archive interactions from all channels, not just voice, so that if there is a customer-agent issue it can be quickly resolved and steps taken to ensure that a similar occurrence does not arise again
 - 6) Smart-recruit and promote your staff. Select only those people who truly have innate, best-in-breed skills and attributes whether for billing/collections, customer service, help desk, and sales. Look for maturity, resilience, and reliability, and experience in similar fields such as retail.

Smart recruiting especially goes for your supervisors. They are the NCOs of contact centers: the chief petty officers and sergeants who

relay the orders to the line staff, and who listen to and inspire loyalty and effort from them. Talent-scout and hire right: i.e. looking for natural leaders, such as those who coach sports in the off-hours, rather than those who are good agents, and your center will succeed. Hire wrong, like promoting those individuals because they are good agents or have seniority or know someone, well you know the rest...

- 7) Empower your agents with decisionmaking abilities, position that as customer care professionals, and recruit, train, and supervise them accordingly, to resolve issues.

This is multi-win all around. FCR rates and customer satisfaction and retention, and ultimately revenues jumps, turnover, and hiring and recruiting drops, and productivity increases. Agents come away feeling that they've actually helped others, which makes them more satisfied with their work, and look forward to working.

- 8) Knock down the data silos. Link the interactions. Enable your agents to easily gain access into different databases such as checking and credit card information. Capture and transmit chat and e-mail interactions to live agents for resolution in calls.

- 9) Plan for the unforeseen, and test your plans. Don't be left to panic, which injuries and kills, when the next disaster happens, which is only moments away...

- 10) Avoid the need for customers to contact your organization for service and problems by making your products, services, pricing, delivery, installation, and repair, the first time.

This advice harkens back to the old saying "a stitch in time saves nine" or in this case the \$7-\$9 per transaction that problem calls can cost, not to mention the loss in future sales from annoyed customers.

If you are unveiling new models or features, do so only after thoroughly testing them. If you are phasing offerings out, like calling or Internet plans or software, let them die a natural death by no longer accepting new customers, rather than killing them off. Both sets of techniques prevent waves of angry and cost-ratcheting calls and contacts, not to mention bad press that together doesn't do much to attract and retain buyers.

Yes, many of these matters are beyond the control of contact centers. Yet timely communication between you and your other operations and clients on ensuring that everyone is up to speed on quality saves money and keeps and attracts customers all round.

To give you leverage you need make sure though that your operations are the best they can be...such as by following the other nine suggestions.



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Investing In Your Business Without Spending A Fortune



By Tim Passios,
Director of Product Management,
Interactive Intelligence

With so much talk about recession and cutting costs, it's no wonder there are so many fears surrounding capital spending. Despite economic uncertainty, companies still have plans to replace or upgrade legacy systems. In fact, this may be a better time to do so than the analysts lead us to believe.

Yes, replacing or upgrading technology can be costly (in some cases), but if you know what to look for, you can end up saving money and increasing your profit margin in the long run.

I get questions all the time from people asking me how to cut IT spending. First, it isn't as much about the expense as it is the long-term investment. If you see potential problems with the product or solution you are considering for your business, it's probably a sign for you to run the other way. Consider the following before you choose your solution.

1. Look at the big picture. Take a thorough look at your communications strategy for the near term and the future to be sure that the solution you choose will serve you now and grow with you later.
2. Avoid stop gap point solutions. Solutions that only solve one problem end up creating additional problems down the road. Purchase "platform" solutions that have the ability to grow with you as your business grows – not only in scale, but in functionality, too.
3. Invest in software-based solutions. Avoid hardware solutions as they are more costly and add complexity. Software-based systems offer more flexibility in an easy-to-manage solution.
4. Invest in open-standards solutions. Open-standards solutions allow you to unify every aspect of your business communications.
5. Leave your customers satisfied. Choose a solution that offers your customers open communication with staff members who can resolve their issues quickly and efficiently.

Some companies have used these suggestions to invest in improvement processes that bring value to their business:

One of the largest entertainment and travel reservation agencies in Las Vegas, Nevada U.S.A. evaluated their communications strategy prior to deploying an all-in-one communications software suite that provides multi-channel contact center automation in their call center. By doing so they increased their agent revenue by 347%. Additionally, the solution allowed them to handle more than twice the interactions while cutting their staff in half.

The Las Vegas based company's previous system would not allow them to handle the more than 3,000,000 interactions they were receiving per month. Furthermore they were forced to abandon more than 2,000 interactions per month. Since the deployment, they've noticed an increase in customer and employee satisfaction. In fact, they reported a zero turnover rate in 24 months.

A large information services company was tired of spending money on stop gap point solutions to solve short-term issues. By deploying open standards, software-based technology in the call center they simplified installation and administration as well as reduced maintenance and support fees.

Since the initial deployment, they incorporated the same technology in the enterprise. In doing so, they've seen an increase in revenue, customer satisfaction, and flexibility allowing for conferencing and team collaboration to be used to resolve customer issues. This has resulted in reduced call times by approximately 40 seconds per call.

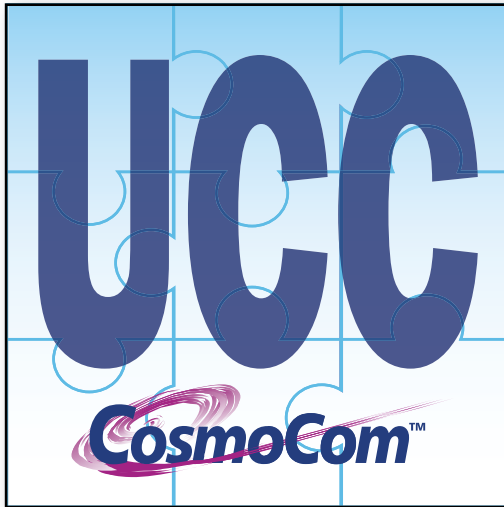
Another company, an "e-distributor" of chemical products and services reported savings of approximately \$100,000 in a year due to deploying an all-software solution. They eliminated expenses on cabling, station cards, and other costs they would have otherwise incurred had they used a traditional, TDM-based solution.

So, whether you decide to make changes during a time of economic uncertainty or in a booming economy, open standards, software-based solutions allow you flexibility to scale and customize your business communications system with changing business needs. The more you do to improve the processes your employees use to enhance the experience for your customers, the more value you bring to your organization. So, even though short-term savings will not be readily apparent, the long-term savings will be immense.

Do you have a clear strategy for improving your business communications?

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

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