



# CUSTOMER INTER@CTION *Solutions*®

January 2009 • Vol. 27/No. 8  
www.cismag.com

27  
Years  
of Excellence

#1 In CRM, Call Centers And Teleservices Since 1982™

## 2009 INDUSTRY FORECAST:

**Executive Insights from  
9 Leading Companies**

### Also In This Issue:

- 2008 Product of the Year Award Winners!
- Leveraging Open Source For Your Contact Center
- What's Ahead in Legislation

# If you value your customers...

## ...why do you keep them ON HOLD?



With InfoCision, they won't be.  
We answer your calls quickly and  
develop a lasting relationship with  
your customers. A few minutes on  
the phone with InfoCision means a  
lifetime of customer loyalty for you.

**9** seconds

Average time to answer inbound calls.

**92** percent

Percent of inbound calls answered in 20 seconds or less.

**3** percent

Overall percent of inbound calls abandoned.



**InfoCision**

THE highest quality call center company in the world!®

1-866-670-4IMC [www.infocision.com](http://www.infocision.com)

\*InfoCision is the only teleservices company to win the MVP Quality Award, presented by *Customer Interaction Solutions* magazine, all 15 years since its inception.





Nadji Tehrani, CEO, Technology Marketing Corp.

## CRM, Marketing And Lead Generation Are Vital In A Recessionary Economy

**R**ecord business failures of companies of all sizes from General Motors, Ford, AIG, Merrill Lynch, etc. to millions of smaller businesses ranging from mom and pop shops to mid-size companies, are obviously the result of the current challenging economic conditions. Every day it seems we hear of another major company filing for bankruptcy, along with countless other smaller firms going out of business. Unfortunately, it appears there is no end in sight.

Still in spite of the overall economic malaise, there are a handful of companies that are growing and setting record sales and profits. Indeed, when you analyze the performance of such companies, one will learn that they are outstanding in marketing, CRM and lead generation, all of which are vital in a recessionary economy. I must add that such companies also are extremely flexible and they constantly reinvent themselves as the economic environment changes.

### Required Strategies for Survival

There is an old saying that dictates, **"If you keep doing the same thing over and over, you will continue to get the same results."** In other words, if a company does not have the vision and savvy to realize that it must change its business strategies to align with the changes in the marketplace, then that company will not be around for long.

**Clearly, in order to survive in today's economy or any economy, you must change the way you do business.**

### The 10 Commandments of Going Out of Business

In July 1994, I wrote an editorial titled, *"The 10 Commandments of Going out of Business."*

The first commandment is: "stop all marketing, advertising and promotion functions. If you do a good job at this, you don't need to read any further." In other words, if you stop marketing, promotions and so on, then you eventually will go out of business. The reason is very simple. In any economy, any given company can lose as much as 25–30% of their customer base for a variety of reasons that are beyond the scope of this editorial. However, in today's near-depression economy, a given company can lose as much as 50–60% of its customer base due to bankruptcies, etc. and, the only way to survive is to religiously establish a solid CRM, marketing and lead-generation program with the objective of producing new sales leads so that you can replace the lost customers

## Congratulations to all of The Product of the Year winners recognized in this issue.

Since 1982, it has been a tradition of Customer Interaction Solutions® magazine to recognize the outstanding products and services developed by industry vendors and suppliers. Indeed, as the preeminent magazine and the pioneering publication of the contact center/CRM industry since 1982, it has been our primary responsibility to inform readers of unique product and services offered in our industry.

Congratulations are, therefore, in order to all award winners listed on page 32 of this issue. We know how important your contributions have been in the development and prosperity of the multi-billion dollar industry known as contact center and CRM industries. Best wishes to all award winners.

Sincerely,  
Nadji Tehrani  
Editor-in-Chief



with new customers. And make no mistake about it, there is no shortcut and no other way around this basic fact of economic survival.

**Marketing's role has been defined as "the process of communicating a company's products, services, and benefits and how the company differentiates and positions itself from competition." In this manner marketing generates inquiries from potential customers commonly referred to as sales leads, which when placed in the hands of capable sales people, eventually result in new business.**

### Why is CRM Important?

CRM, customer care, and customer service are the main ingredients of customer retention. There was a time when customer service alone was satisfactory, but that is no longer enough today. The customer today is extremely savvy, they know what they want and they are extremely demanding. That's why customer relationship management (CRM) is vital to keep the customers continuously satisfied. It has been said, **it costs 10 times more to find a new customer than it costs to keep the present customer satisfied.** Indeed, this is another cardinal rule of survival in any economy particularly in today's disastrous economic environment.

### Why Marketing?

If you have been reading my editorials since 1982, you have read that one of the important concepts of business that I have been preaching all along has been that if you don't market, you don't exist. Of course, over the years, this particular rule of business has changed to read as fol-

lows: "if you are not on the first page of the leading search engine, you do not exist." In other words, if you are truly serious about remaining in business, you must develop a new marketing strategy that would help to place your company on the first page of Google, Yahoo, etc. Believe it or not, there is no shortcut in this. You simply must dominate your online marketing to place your company not only on the first page, but ideally to dominate your industry, you need to be #1 on the first page. Indeed, one of the services that TMC provides is to help companies to become prominent on the first page of the leading search engines. With up to 3 million monthly unique visitors to TMC's Web site (TMCnet.com), TMC has been uniquely able to play a vital role in the marketing of leading corporations in technology and information, which includes contact centers, CRM, VoIP, and assorted other new technologies. I urge you to visit TMCnet.com and gain from its over 3 million pages of content.

Having said all of the above, without marketing, there will be no lead generation. I once defined marketing's role as "the process of communicating a company's products, services, and benefits and how the company differentiates and positions itself from competition." In this manner marketing generates inquiries from potential customers and such inquiries are commonly referred to as potential sales leads, which when placed in the hands of capable sales people, then it would eventually result in new business.

### Why Lead Generation?

By now it should be clear what the *raison d'être* of lead generation is. There was a long time when corporate America was practically oblivious to getting leads from their marketing dollars. Either their advertising campaign was not good enough or the ads were placed in the wrong places or the nature of marketing was not properly selected. Every one of those companies, if they still exist, must change their way of doing things and leave the old marketing methods. They must acquire digital marketing skills to outdistance themselves from competition and survive in this economy.

### The Bottom Line

**Without CRM, you will lose customers even faster than the adverse economic conditions would force you to lose them. Accordingly, CRM is vital, just as marketing and lead generation, which are the results of digital marketing strategies necessity for the survival for any company. CIS**

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



## 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.

**Five9 call center software  
applied to your operations  
delivers high-impact results for:**

- ❖ Customer service and support
- ❖ Call center virtualization
- ❖ Sales generation activities
- ❖ Customer insights and experience
- ❖ Business continuity options

Powered by:





Executive Group Publisher and Editor-in-Chief  
**Nadji Tehrani** (nadjitehrani@tmcnet.com)

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

## EDITORIAL

Group Editorial Director, **Greg Galitzine**  
(ggalitzine@tmcnet.com)

Senior Contributing Editor, **Brendan B. Read**  
(bread@tmcnet.com)

## CONTRIBUTING EDITORS

**David Sims**  
**Susan Campbell**  
**Stefania Viscusi**  
**Joe Fleischer**  
**Keith Dawson**

## TMC™ LABS

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

## ART

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

## EXECUTIVE OFFICERS:

**Nadji Tehrani**, Chairman and CEO  
**Richard Tehrani**, President  
**Dave Rodriguez**, VP of Publications & Conferences  
**Michael Genaro**, VP of Marketing  
**Tom Keating**, VP, CTO

— To Subscribe, Call: 203-852-6800 —

Or write to the circulation director at [srusso@tmcnet.com](mailto:srusso@tmcnet.com).  
Subscription rates (published monthly): Digital Subscriptions free for qualified U.S., Canadian and Foreign subscribers. Print Subscriptions free for qualified subscribers in the U.S.A. only. For non-qualified U.S.A. subscribers, \$49. All Canadian subscribers, \$49. All Foreign (air mail), \$85. All orders are payable in advance in U.S. dollars drawn against a U.S. bank. Connecticut residents add applicable sales tax.

Circulation Director, **Shirley Russo** ([srusso@tmcnet.com](mailto:srusso@tmcnet.com))

**Reader Input:** CIS encourages readers to contact us with their questions, comments and suggestions. Send e-mail (addresses above), contact our Web site ([www.cismag.com](http://www.cismag.com)) or send mail.

We reserve the right to edit letters for clarity and brevity. All submissions will be considered eligible for publication unless otherwise specified by the author.

**Reprints:** For authorized reprints of articles appearing in CIS, please contact Reprint Management Services at 1-800-290-5460 or e-mail them at [tmcnet@reprintbuyer.com](mailto:tmcnet@reprintbuyer.com).

**Lists:** For list rentals, please contact Glenn Freedman at [glennf@i-s-t.com](mailto:glennf@i-s-t.com) or call 516 227-2010, ext. 101.

## ADVERTISING SALES: 203-852-6800

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

## EXHIBIT SALES: 203-852-6800

Global Events Account Directors

Companies whose names begin with:

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

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

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

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

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

Copyright © 2008 Technology Marketing Corporation. All rights reserved. Reproduction in whole or part without permission of the publisher is prohibited.

Customer Inter@ction Solutions® and the TMC Logo are registered trademarks of Technology Marketing Corporation.

## A Technology Marketing Publication

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

## IN EVERY ISSUE

- |   |  |
|---|--|
| <b>1 Publisher's Outlook</b><br>By Nadji Tehrani, Executive Group Publisher, Technology Marketing Corp. | <b>18 Listen and Learn</b><br>By Joe Fleischer                               |
| <b>6 High Priority!</b><br>By Rich Tehrani, Group Editor-in-Chief, Technology Marketing Corp.           | <b>19 From The Analysts' Desks</b><br>By Susan Campbell, Contributing Editor |
| <b>8 Headset</b><br>By Keith Dawson   | <b>26 Compliance Desk</b><br>By Brendan Read, Senior Contributing Editor     |
| <b>10 Customer Interaction News™</b>  | <b>40 Logout</b><br>By Brendan Read, Senior Contributing Editor              |
| <b>10 CallCenterComics.com</b><br>By Ozzie Fonseca  | <b>39 The Integrated Marketplace™</b>  |
| <b>14 On The Line</b><br>By Tim Searcy  | <b>39 Advertising Index</b>  |

## What's on the Cover



Industry Leaders Share Their Views  
Regarding the Growth and Trends in  
the Contact Center/CRM Industries

pg **20**

## CRM, BPO & TELESERVICES

- 31 Speaking With Eagle.net Founder Kent Charugundla**
- 35 CRM, The Tampa Bay Rays and Detroit Lions**  
By David Sims, Contributing Editor
- 36 Needs-Meeting CRM**  
By Brendan Read, Senior Contributing Editor

## CALL CENTER TECHNOLOGY

- 16 Interactive Intelligence: Forecasted Contact Center Technology Applications 2009**  
By Brendan Read, Senior Contributing Editor
- 20 Industry Leaders Share Their Views Regarding the Growth and Trends in the Contact Center/CRM Industries**
- 28 Opening the Door to Open Source**  
By Brendan Read, Senior Contributing Editor

## WORKFORCE OPTIMIZATION

- 24 What's Ahead in the Workforce Solutions Industry**  
By Brendan Read, Senior Contributing Editor

## AWARDS AND RECOGNITION

- 32 The 2008 Customer Interaction Solutions Product of the Year Awards**

To receive free information from our premium advertisers, please visit [freeinfo.tmcnet.com](http://freeinfo.tmcnet.com).

# CONTACT CENTER COMMUNITY

SPONSORED BY:



INTERACTIVE INTELLIGENCE

<http://callcenterinfo.tmcnet.com/>  
Log On Today!





Rich Tehrani, Group Publisher, Technology Marketing Corp.



## Aspect Makes Performance Management Acquisition

Combined entity to provide enhanced performance management, coaching, employee review and workflow functionality

**A**spect has done a great job rolling up a number of call center companies and even in a slow economy is not letting up. In fact, the company just acquired AIM Technology, a company that streamlines the contact center process allowing organizations to more easily motivate, measure and manage employees. The San Francisco-based group was purchased for an undisclosed sum and the resulting product line will be called PerformanceEdge Performance Management.

This acquisition is a natural part of building out the [PerformanceEdge](#) business, according to the company.

In a conversation by phone with the Aspect Management team it became apparent that the icing on this acquisition cake is the fact that AIM Technology's solutions are based on [Microsoft SQL Server](#). I am told the enhanced relationship between Aspect and Microsoft including a cash infusion by the operating system giant is a reason for increased business. This is especially true in UC environments, and obviously having more Microsoft-based technology in its arsenal can only help Aspect. The company calls this addition of Microsoft technology "cost efficient" and you can consider this being synonymous with saying it is better to have a single vendor than trying to get Linux to behave nicely with Microsoft.

For existing customers, I am told this acquisition will be transparent and the offering will come in flavors geared at the mid-market which is 200–1,000 users. Beyond that, there is an enterprise edition which will be helpful for companies with multiple data sources and multiple sites. Prices are \$350 and \$500 per named agent respectively.

I asked [Aspect](#) about how the call center market is doing in these challenging economic times and they mentioned that decisions are slowing in customer service related sales but speeding up in collections. This is consistent with what I am hearing elsewhere, by the way.

Aspect tells me they see themselves quickly evolving to become a unified communications solutions provider. This includes software and consulting services around UC and the contact center.

I am told going forward the company will absolutely continue to acquire the skills needed in the contact center, Microsoft UC and services sectors. Basically if you read between the lines (not that you need to), we will see more acquisitions and I wouldn't be surprised to see the company evolve into a major [Avaya](#) competitor across all the NJ-based company's product lines.

According to the company, there are elevated conversations with customers due to the Aspect/Microsoft alliance. There

was some initial confusion among customers regarding how the Aspect alliance is different from the one with [Nortel](#) but I was told this has been cleared up by explaining the Aspect relationship is more focused on the contact center.

When asked about the hosted market, execs explained that the managed service offering they have in performance management is doing well as many customers are looking to get up and running quickly but IT departments are not able to keep up.

In addition, the company works with partners in the hosted ACD space and they are seeing more tire kicking by customers in the [SaaS](#) space. The company is also reselling TellMe as a hosted IVR solution. But where the relationship gets interesting is the integration of TellMe and the Aspect inbound routing and outbound dialing capabilities.

The company has slowly been rolling up so many competitive companies over the years and as it has done this, one of its claims to fame is the "one place to view reports" and "one place to manage routing rules" philosophy. This now applies to Microsoft's TellMe as well and gives the company a unique hybrid approach with on premise equipment merged with hosted in-the-cloud solutions.

Aspect tells me customers like this blended approach as it allows them to not worry about having the required ports to handle peak call volume. The usage-based model is something the company seems to like and will likely be an area where Aspect will devote more energy going forward.

The timing of this acquisition shows Aspect is still very committed to the contact center space and although I don't expect this purchase was for a major sum of money, it shows Aspect is still looking to round out its portfolio with companies that fit within its product roadmap. For Aspect customers, this is a good thing and for fledgling developers in the contact center market, Aspect still represents an exit strategy.

The good news is this M&A activity in the contact center space will likely fuel more investment in the market. In all, this is good for contact center industry and will increase the level of competition — which is great for all involved. **CIS**





Sponsored by:



**POLYCOM®**

## **Polycom's HD Voice Community on TMCnet**

The gathering place for vendors, service providers, and users of HD Voice and wideband audio IP telephony.

Tap into a vast array of resources helping you select HD Voice services

- Whitepapers
- Webinars
- "Ask the Expert" Commentary
- Podcasts
- Blogs
- Breaking Industry News

**<http://hdvoice.tmcnet.com>**

Powered by:



Keith Dawson, *SENIOR ANALYST, FROST & SULLIVAN*



## Best Practices in Multi-Sourcing

The choices are dizzying, and challenging. Here's how to make them without heartache.

**A**s we head into a period of prolonged economic downturn, companies with call centers are going to spend much of 2009 and beyond looking for the most cost-effective mix of labor. At the same time, centers are trying to lock in customers for as long as possible, with the best mix of service, speed and convenience. Many are turning to multi-sourcing, the practice of creating the best possible mix from numerous outsourced suppliers and internal resources, including remote agents.

Mixing a multitude of labor and service options is complex. Companies have historically had a hard time coordinating multiple outsourcers, and centrally managing their various outsourcers alongside their internal and virtual agents.

But there are some best practices that can be applied (and questions to ask before you embark) that can make the process flow smoothly.

**The consequences of lingering disharmonies are serious because the customers that are most likely to detect inconsistencies are your most valuable ones. The ones likely to be annoyed or dissatisfied are disproportionately the repeaters, the higher value continuous customers.**

Does it impact service quality? It can, but it doesn't have to. If you posit a mixed environment that combines in-house and multi-sourced agent pools, you will likely start to see variations in some of the key metrics: first call resolution, the number of transfers, and the length of calls. Customer satisfaction, as expressed in survey data, may start to show a drop.

The problem, though, may be as simple as lack of harmonizing basic simple procedures among your varied sources. That sounds painfully obvious, but it's key because small disharmonies mag-

nify into large variations in customer sat. The consequences of lingering disharmonies are serious because the customers that are most likely to detect inconsistencies are your most valuable ones. The ones likely to be annoyed or dissatisfied are disproportionately the repeaters, the higher value continuous customers.

Will you see the savings you expect? That depends on whether your expectations are realistic. Do your plans for savings anticipate material benefits? That is, can they be measured? If you're expressing your hopes for gain in intangible things, or even semi-tangible ones like customer sat, you're in for trouble. Also, one pitfall is the question of whether savings in one area will be overwhelmed by extra costs in another — these can sometimes be foreseen and dealt with. It's lack of foresight that gets people in trouble.

Having a mixed, hodgepodge of labor sources (and systems that measure their performance) can cause a steady erosion of service levels over time. Not a catastrophic decline, necessarily, but an accretion of management headaches that come from the fact that people in one group are being monitored  $x$  times per month, and those in another group  $y$  times per month, and who is calibrating the quality evaluations between all the different sources?

The lack of common infrastructure means you may be unwittingly measuring by different yardsticks or incenting for different outcomes in different locations.

Having said that, is all this an argument for not multi-sourcing? No. It's an argument for preparation, harmonization, and adoption of certain practices to inoculate yourself against these pitfalls.

Straightaway, you need to make two critical distinctions:

- between what you can control and what you can't control
- between what matters and what doesn't matter



The whole point of multi-sourcing in all its many forms is letting go. That means there will be things you might like to control that you have to give over to someone else for cost reasons. You could spend a lot of time and trouble agonizing over what switching or call routing platform your various outsourcers use. You could even lay down the law and say you'll only use sourcers that have Avaya or Genesys implementations, or whatever specific qualities you prefer.

But what matters most is the outcome, and your ability to measure the outcome. The whole point of multi-sourcing is to allow for variations in how to achieve the outcome you desire, because not all methods and modes are right for every opportunity.

So you need to draw a hard line on the page separating what you really and truly care about from everything you can let go. And the most important thing you care about is consistency of the customer experience.

You need to abstract the measurement of the customer experience from the providers of the multi-source environment. In other words, despite multi-sourcing, you have to create a system-wide format for how you're going to define and measure "success" in customer interactions.

All of this depends on a consistent data infrastructure. Even if your physical infrastructure is distributed, even if your human resources are dispersed, you can enforce a common set of data standards among all the parties.

The main justification for multi-sourcing is the idea that it shouldn't matter what or where the physical components are, as long as you have consistent results. That's true if (and only if) you establish standards that have everyone measuring the same things with the same criteria and reporting through a centralized portal or data warehouse. The central dashboard should be able to roll up across all sources and should be able to pinpoint which sources deviate from set norms.

What should dictate the business processes and policies and workflow is not the outsourcer, or the outsourcer's technology. It's call center management overall, as measured in-house.

The message overall is this: don't assume that multi-sourcing, or outsourcing of any kind, replaces sound internal management. You can multi-source capacity, but you can't multi-source judgment, control, or management oversight.

Call center multi-sourcing should never be the source of more risk and worry. It should always reduce risk and worry. If it's not, you've fallen into the trap. **CIS**



**MIND THE GAP**

Between what you want and what you can do lies a solution

If you have big dreams for your call center, but a meager budget that stands in your way, take heart. Automated communications can bridge the gap.

Varolii's automated solutions open up the possibilities, even during tough economic times. Reach more people, affordably, while maximizing your call center and IT resources.

Varolii will show you how to get **a better Return on Interactions.**

**LEARN MORE**   
[www.varolii.com/mindthegap](http://www.varolii.com/mindthegap)  
or 800.206.2979



- **Avaya ([www.avaya.com](http://www.avaya.com))** now offers automated multichannel (voice, e-mail, SMS) outbound messaging services tailored for the financial and healthcare industries. The new solutions, Proactive Outreach for Financial Services and Proactive Outreach for Healthcare, enable greater efficiencies, improved cost savings and enhanced customer experiences. Outbound messaging achieves these results by alerting recipients in near real-time with needed information such as fraud alerts or doctor visits respectively. This not only helps companies cut down on expensive incoming calls, but also frees up live agents to handle more complex interactions, thereby driving improved efficiency and customer service.

- **Convergys ([www.convergys.com](http://www.convergys.com))** now offers Intervice® Voice Portal 6.0 (IVP 6) and the introduction of its next-generation application creation environment – Interaction Composer. With IVP 6, enterprises can now create highly personalized speech solutions, leveraging a set of rules and policies that can be easily constructed by integrating with the Convergys Dynamic Decisioning Solution. Interaction Composer enables the development of applications that allow callers to perform tasks simultaneously or interrupt tasks with new requests, and then resume tasks where they left off. For enterprises with legacy IVR applications, Interaction Composer also enables the migration of legacy IVR applications to open-standards applications that can include a speech option for more efficient self-service calls

- **FrontRange Solutions ([www.frontrange.com](http://www.frontrange.com))** has added speed to its help desk solutions with HEAT® Plus Mobile, which enables field-based technicians to access and update critical service management information including new trouble ticket alerts through BlackBerry® smartphones. HEAT Plus Mobile offers

configurable realtime sync capabilities that remove the dependency on wireless connectivity to access data and remote onsite incident logging and tracking that enables field techs to handle assistance from customers on other issues

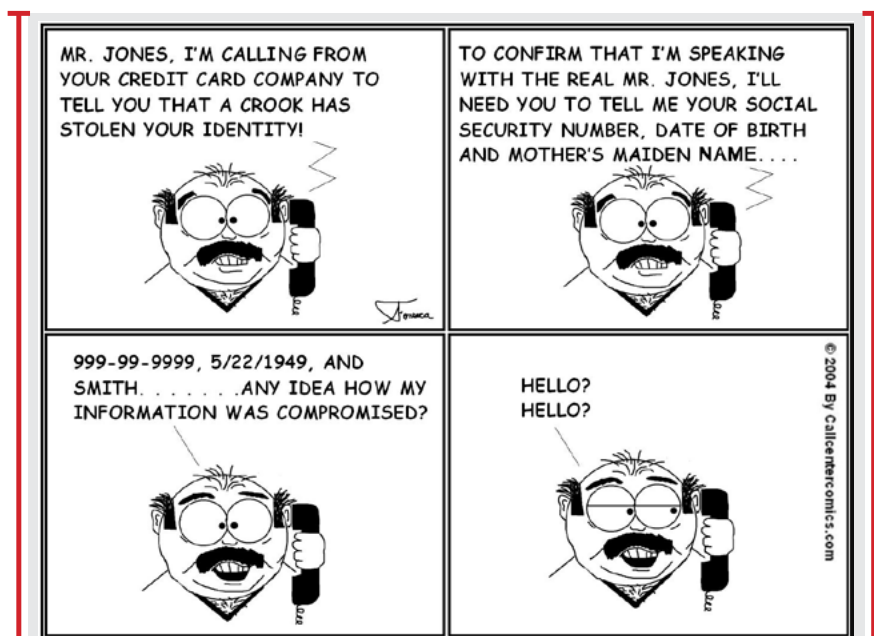
- **HarQen ([www.harqen.com](http://www.harqen.com))** is gradually rolling out VoiceScreener, an automated prospective employee pre-screening solution which enables firms to process large volumes of candidates quickly while eliminating the need for time-consuming, expensive, and occasionally challenging live phone interviews. VoiceScreener lets HR professionals use their phones and simple Web-based dashboards to create and distribute custom, recorded phone interviews. HR personnel can put a series of questions into the system in the form of voicemails. Invitations can then be sent to the aspiring candidates and also links for the interviews

- **ICCM ([www.iccm.co.uk](http://www.iccm.co.uk))** has made e-Service Desk, a helpdesk management solution built upon the [Metastorm](#) BPM platform available in

the U.S. Recognized for its process enabled design, the e-Service Desk can be integrated to deliver a range of applications including the provision of mobile solutions through BlackBerry mobile devices. This highly flexible and configurable service management solution can be implemented quickly, with minimal disruption to organization's working practices

- **Interactive Intelligence ([www.inin.com](http://www.inin.com))** has added SMS to its Customer Interaction Center® (CIC) contact center suite to enable contact centers to communicate with customers both inbound and outbound via this versatile increasingly popular channel. Contact centers will be able to route, record, and report on SMS on the same way as other media types. Contact centers will also have the ability to push SMS alerts to users

- **Oracle ([www.oracle.com](http://www.oracle.com))** has upgraded its Siebel CRM solution. Oracle's Siebel CRM 8.1.1 has updated self-service functionality, including Siebel eSupport and Siebel







eCommerce applications, with Java-based J2EE applications built on Oracle® Fusion Middleware that extends Siebel's CRM product to the Web channel. Siebel CRM 8.1.1 now provides industry-specific customer self-service for communications and the public sector, as well as enhanced use of multi-channel applications with Siebel Chat and deeper, more comprehensive search capability. It also includes new deal registration capability to provide improved visibility into channel partner deals—ultimately enabling increased sales effectiveness of the partner channel.

Siebel CRM 8.1.1 is supported by new features in Siebel Loyalty, Siebel Marketing, and Siebel Sales. The entire customer loyalty program lifecycle is supported by providing membership enrollment and management, including loyalty points accrual and redemption, member services, partner management and promotion management. There is now a closed-loop solution that uniquely empowers all members of the marketing organization with actionable insight by automating processes across the marketing function, from strategy and planning to multi-channel response and lead management execution. Sales forecasting capabilities have been extended to give sales teams the flexibility to manage and share forecasting in cross-functional teams and to perform ad hoc adjustments that help improve sales quota attainment

- **OrecX** ([www.orecx.com](http://www.orecx.com)) has bolstered the Oreka Total Recorder (TR) software by enabling to be ready to connect into most commercially available speech analytics engines, thereby increasing ability to process call data and uncover hidden value. It also now has an open Application Programming Interface (API) that permits software companies to enhance their solutions and strengthen their customer base by integrating Oreka TR functionality directly with their applications. Oreka TR, a companion product for OrecX's free Oreka GPL open source call recorder, organizes and catalogs calls over a standard SIP-based VoIP

interface. Oreka TR allows call storage and retrieval by timestamp, duration, direction, as well as by remote or local party

- **SpeechStorm** ([www.speechstorm.com](http://www.speechstorm.com)) plans to launch a new suite of Visual IVR applications. With it enterprises can now offer their customers a new, intuitive way to transact with them using a simple video call on their mobile phones to give a visual representation of their service options. Adding visualization to traditional IVR reduces the time people spend listening to full menu options before making a choice. It puts a visual element to the business transaction itself, such as transferring money or checking in for a flight, enabling the user to complete the transaction much quicker and more intuitively. Visual IVR is gaining increasing acceptance in Europe, where SpeechStorm is located with the growth and proliferation of the 3G network.

- **Vantage Communications** ([www.vantageip.com](http://www.vantageip.com)) has launched a new small to medium-sized business-targeted CRM solution: vPlatform™ CRM. vPlatform CRM, available as a hosted solution, includes advanced customer retention and revenue and sales force automation enhancement tools, marketing campaign ROI analysis, analytics and reporting, and business intelligence functionality

- **Verizon Business** ([www.verizonbusiness.com](http://www.verizonbusiness.com)) now offers a VoIP lab where its U.S. clients can test the compatibility and capabilities of customer premises equipment (CPE) that has not been certified with the Verizon VoIP or IP Contact Center (IPCC) portfolios. By participating in the Verizon VoIP Interoperability Lab, a company can test drive virtually any piece of equipment, such as an IP [PBX](#) or a Premise Session Border Controller, during a two-week trial period, using a simple Internet connection and Verizon VoIP or IPCC service. Following a successful trial customers can then elect to contract for VoIP or IPCC, using their CPE

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

Signed,  
Speedy Gonzalez, PA

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

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

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

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

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



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

  
**zeacom**  
communications center

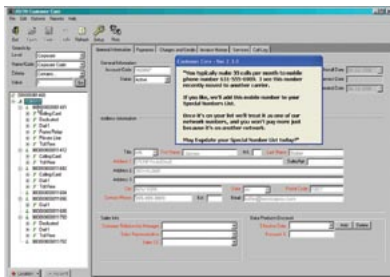
800-513-9002  
[usasales@zeacom.com](mailto:usasales@zeacom.com)



## Aperio CI's Social Network Analysis & Propensities (SNAP)

**A**perio CI ([www.aperioci.com](http://www.aperioci.com)) has come out with the Social Network Analysis and Propensities (SNAP), a powerful application that helps identify social groups within a company's customer network to generate increased revenue and build retention among social network members. Offered initially to and written for wireless carriers, SNAP will likely be adapted for other markets with similar characteristics, such as retail and banking.

SNAP enables accurate assessment of the value of individual customers based on not only their specific transactions but also on the degree they influence the buying decisions of others. It taps into the core fundamentals of human interactions, which is exchanging information in peer groups in each of which there are dominant individuals whose knowledge and counsel is listened to and usually followed by the others. These people can therefore, because of their influence, make or break products. SNAP identifies these peer groups and influencers by examining call and contact records: who calls and contacts whom, how often, and how long.



### Key Features and Components

- Call record assessment, social group determination, user categorization in terms such as Deciders, Connectors, and Influencers and assignment of risk and value to each category
- Passive behavioral analysis based on the data collected
- 'Connected Value', or revenue generated by a sub-set of social network members methodology, to quantify customers' true value to wireless operators
- Ability to utilize the influencer category to better retain and sell new services through personalized, subtle and less intrusive campaigns

### System Requirements

SNAP utilizes elements of several of Aperio CI's existing solutions, including its SmartSave and FlashTrac applications. SNAP meets all privacy and security mandates, can be integrated with campaign, and offer management protocols to deliver information through multiple channels. SNAP utilizes existing customer data. Operators do not need to conduct additional data processing to integrate into SNAP. Aperio CI can have most customers up and running in within 45 days.

### Pricing

SNAP is priced on a per subscriber basis with a monthly charge for the service and analysis that ranges from 1.7 cents (US) to 4.5 cents (US) dependent upon volume, reporting and output requirements to the operator. There is also a non-recurring set up fee for adaptation to the customers' current infrastructure and specific data structures and inputs. **CIS**

## Fonality's PBXtra Unified Agent Edition

**F**onality ([www.fonality.com](http://www.fonality.com)) has married customer relationship management (CRM) software and telephony to provide a complete integrated view of multichannel contact center operations with its PBXtra Unified Agent Edition (UAE) product. First offered with Salesforce.com, PBXtra UAE may be integrated with other CRM applications in the future.

**Fonality** UAE works by automatically adding call history and other call intelligence to a customer's Salesforce.com database. It allows a Salesforce.com user to have a 360



degree view of all interactions with their customers, including phone calls, call recordings, and time to follow-up on new leads. UAE, says Fonality costs a fraction of what it would cost to write a custom in-house application to try to accomplish the same level of telephony and CRM analytics.

PBXtra Unified Agent Edition enables companies to increase close rates, revenue and profits, while providing improved customer service and dramatically reducing sales and support costs. Managers can easily measure, test, and improve sales and support processes, view the effectiveness of human resources, salvage opportunities or identify service level agreement lapses. They can find out the number of calls it takes to convert a lead to a sale and determine which agents are the most responsive.

### Key Features and Components

PBXtra Unified Agent Edition includes the following features and components:

- Reporting to understand how follow-up time impacts close rate
- Track and record all call history in Salesforce.com CRM automatically
- Listen to call recordings from inside Salesforce.com
- Stack-rank agents by call frequency and duration
- Instantly report all leads not called within a specified period
- Screen-pops and click-to-call
- Automatically route inbound calls to their account owner, by caller-ID match
- Displays small Outlook style on-screen alerts that shows how much calls are worth in the first rings

### System Requirements

Customers need to have the Fonality PBXtra Call Center Edition and a subscription to Salesforce.com's App Exchange

### Pricing

Unlimited agent pricing starts at \$4,000, for existing Call Center customers or \$6,995 for new customers, which includes server hardware. Customers must also have a valid Salesforce.com account. The applicable fee is \$65/month per user **CIS**



# WHAT IF YOU COULD IMPROVE YOUR CUSTOMER SERVICE WITH THE FLIP OF A SWITCH?

*tContact makes it almost that easy!*

## tContact™

Modular software solutions that enhance  
the *efficiency and effectiveness* of your  
contact center

Works with your current ACD\*. Offers...

- ◆ New contact channels – queued web chat, SMS, and email
- ◆ Cradle-to-grave reporting
- ◆ Speech Recognition options
- ◆ ...plus screen pop, IVR, callback, blended outbound call campaigns & much more!

\*Features may  
vary among ACD  
mfr and version.

*What's Our Call Center Missing?*  
☒ True Cradle-to-Grave Reporting  
☒ Intelligent Enterprise-wide routing  
☒ Real time Stats Enterprise-wide  
☒ Speech-enabled IVR  
☒ Screen Pop - integrated  
☒ Email and Chat in the call center  
☒ Blended, feature-rich outbound campaigns  
☒ A solution for all of the above?

**TFB** TECHNOLOGY  
FOR BUSINESS  
CONTACT CENTER SOLUTIONS  
FOR THE REAL WORLD

Whatever your phone switch, whatever your challenges, let us show you the ROI and show your supervisors the tangible benefits of using tContact. For more information or to schedule a demo, send us an email at [sales@tfbc.com](mailto:sales@tfbc.com). or call us toll free at 877. 612-4TFB (4832).

**www.tfbc.com**

By Tim Searcy



## Let the predictions begin!

The speeches have been given, and the losers are licking their wounds and paying their debts. Everyone is a little sad that the great sporting event of the election season is once again over. However, the repercussions are just beginning to be considered. Although the inauguration of President Obama may have actually taken place by the time you read this, there is plenty we can still guess about this new administration. Let me join the cacophony of punditry with some political predictions of my own:

1. Minimum wage is going to go up. If re-distribution of wealth is the real stated and understood goal of this new administration, we can expect to see wage increases over the next several years. Although the money is going to be hard to find, government is going to expect "real wages" to effectively rise at least 15% over the next few years for those that are in the bottom quartile of the employed population. This means that we can expect to see a great deal of pressure to cut costs and decrease service levels in contact centers to manage for this expense increase. The push for higher wages will have the effect of increasing pressure to either send jobs offshore or to employ technology at a much higher rate. Either way, left to its own devices, those elements which increase cost are going to have the unintended consequences of driving employment in the contact center industry down in the United States.
2. Unions are going to enter the contact center industry in a big way. With 5.3 million employees in the contact center industry and a revitalized CWA emboldened with new union forming tools and powers, we would be foolish to think that this is not going to happen. Keep in mind that the new President of the United States took \$80 million in campaign contributions from this constituency, and they are going to look for some payback. The Employee Free Choice Act is designed to make it very easy to organize a union and almost impossible to remove one.
3. A multitude of labor oriented pieces of legislation will be contemplated and probably passed. The next administration has made it clear that this is the era of the employee and not the employer. For this reason, we can expect very little meaningful discussion around balancing business and employee interests. A conversation I had with Chad Richter from Berens & Tate has gotten me scared right down to my socks. Chad is an expert in labor law, and he brought to my attention no less than nine pieces of legislation and regulation creation, which will make costs to operate a domestic contact center increase dramatically. Everything from the new American Disabilities Act modifications to changes in mandatory sick leave and new definitions for exempt versus non-exempt employees.
4. Consumers are going to enjoy unbalanced representation as well. Consumer protection is an easy segue from employee protection. For this reason, we can expect that legislation the American Teleservices Association (ATA) has been predicting concerning severe limitations on cross-sell, up-sell, and the use of the existing business relationship are going to be turned from idea to law.
5. The ATA's petition for federal exclusive jurisdiction will be answered . . . and we will win! This is the hardest prediction to make, but it is probably the bright silver sliver in a cloud filled sky. Centralization of regulatory authority makes tremendous sense to an incoming government which feels that laissez faire and state driven regulation have been ineffective at curbing corporate abuse in almost every area of business. By centralizing authority, it will make regulation much easier to pass and implement. The sour taste you are experiencing is the knowledge that the decision to support exclusive jurisdiction will be for the regulators' benefit, and not the industry's.
6. Tax incentives and penalties for staying onshore versus going offshore will make little to no impact on the contact center industry. Other costs are going to be so much higher that we can anticipate a lot of contact centers will be forced to go overseas to maintain cost structures and ultimately competitiveness. However, we can expect to see the Lou Dobbs' witch hunt over jobs going overseas in contact centers and other industries to reach a fevered pitch.
7. Everything is going to take longer than people think. Don't get me wrong, many of the changes which will be hardest on our industry will come to pass quickly. However, the President-elect has to appoint not dozens, but literally hundreds of bureaucrats to positions. Many of these positions require Senate approval. For this reason, it will take until late in 2009 for enough dust to settle to even begin to consider what this is all going to mean to us.

What are we (the ATA) going to do about all of this? We are meeting in April in Washington D.C. to outline the strategy and define the steps necessary to create a partnership with decision makers and use what power the ATA Political Action Committee has created for us. If you would like to join us or contact me, please visit our website at [www.ataconnect.org](http://www.ataconnect.org) or send me an e-mail at [tim@ataconnect.org](mailto:tim@ataconnect.org). **CIS**





## Introducing the Outbound Call Center Online Community

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

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

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

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



Powered by:





# Interactive Intelligence: Forecasted Contact Center Technology Applications 2009



In May 2007 Interactive Intelligence surveyed its clients on business needs and issues including what technologies they are interested in and would be further interested in deploying at the contact centers over the next 18 months.

We have followed up with Rachel Wentink, Senior Director, Product Management to find out which of these hardware and software tools and related services these organizations are likely to go live with in 2009 in the view of the economic downturn, changing needs, and technology evolution.

Here is a summary of the 2007 survey. The second figures are percentages of the first numbers

- 8.25 percent: video, deployment: 7.83 percent
- 6.8 percent: decision support and data mart, deployment: 10.67 percent
- 3.8 percent eLearning, deployment: 4.9 percent
- 3.3 percent fixed-to mobile convergence, deployment: 6 percent

## Video

While video ranked at the top of technology charts when the survey dug deeper it found that the vast majority: 89 percent cited video conferencing and only 11 percent said ACD-routed video either unidirectional (customer to agent, agent to customer) or bidirectional.

Wentink says interest would be rising into 2009 with videoconferencing because while fuel costs have dropped though airfares have not fallen that much, and budgets especially for travel have tightened up.

“Even if airfares were to decline significantly people will still want to save money on their travel budgets and fly only to very important meetings or where they need to be on the ground,” says Wentink.

In contrast, ACD-routed video appears to have less interest than when the survey was taken.

While the tool has specialized applications, such as demonstrating how to fix products and telemedicine where medical professionals can remotely examine patients, Interactive Intelligence has seen few inquiries in having that feature added to its products.

ACD video also poses challenging human resources issues such as hiring and screening for appearance that can open organizations to lawsuits by rejected applicants. Appearance is also sometimes used by employers as a cover for gender and race bias.

“Video is not at point where many firms can justify ‘yes it would be nice to see you’,” adds Joe Staples, Senior Vice President, Worldwide Marketing. “It has got to have ROI like cutting travel customers in videoconferencing or an application that requires a visual interface, such as seeing you repair hardware or how deep that cut on your arm is. Outside of those uses, there is not going to see much movement in video.”

## Decision support/data marts

Decision support and data marts ranked high on the technology list and for good reason. Some firms want to perform data analytics while others are looking to bring information together from the contact centers and other channels to better understand sales patterns and product demands. The specific technologies that they are looking at include business intelligence, speech analytics, and trends analysis software.

“I started in the contact center industry in 1990 and the questions contact centers have now are the same as then,” explains Wentink. “These are: ‘what’s going on, why are people contacting us, and how best can we answer their questions’.”





The willingness to invest in decision support tools and data marts will depend on the ROI analysis and how strong organizations are financially and in market position to justify those outlays.

Vendors have responded with less costly scaled down versions of them, and are frequently offering these technologies on a hosted basis rather requiring buying licenses and hosting the solutions on their hardware, software, and networks.

“Those who purchased decision support technologies before the downturn are using them while those who haven’t are waiting,” explains Wentink. “There are less expensive tools out there and they will be looking at those to see if they can justify them on reduced budgets.”

### eLearning

There is continuing interest in eLearning, which works best and is deployed for knowledge improvement, skills refresher and enhancement, and in simulation-type of training. In some instances, eLearning can substitute for more costly instructor-led training. Rather than pulling agents off the phones, for instance, a short eLearning module covering relatively simple topics can be offered during times of low call traffic. Time can be scheduled in advance for more complex learning activities but the computer can still be the delivery mechanism.

Yet similar to decision support and data marts, firms may not invest in it or may cut back on training of all types unless there is strong ROI and the information delivered is critical.

Some of eLearning-imparted training might be put on hold. For instance, e-Learning modules on softer skills, such as handling angry customers better, may be viewed by management as something that can wait. eLearning that updates knowledge on products, services, and procedures would still be likely be okayed.

“Companies have to see a strong and immediate ROI on eLearning in order to motivate themselves to purchase an eLearning system or send staff to instructor-led training,” explains Wentink. “If they see hard ROI then they have to balance it against other needs that they have. eLearning might win in that situation depending on how the others rack up.”

### Fixed-to-mobile convergence

Fixed-to-mobile convergence is the ability of staff, such as sales reps, higher level support reps, and managers to have the same platforms for smartphones, laptops, and desktops and unified communications to connect them as they either move around a facility and/or travel

outside of it. They need this seamless transition from environments regardless of communications media, such as for an outside sales team member who is talking to a client while leaving an office, driving, and arriving at their next appointment.

Fixed-to-mobile tools have been developing: such as mobile CRM platforms and 3G and 4G-network delivered wireless voice and data services on multifunctional and user-friendly smartphones. Competition and customer pressure are making them more affordable. Yet as with other technologies the hard questions organizations are asking is whether the outlays can be justified.

“Fixed-to-mobile convergence is another situation where hard ROI is critical,” explains Wentink. “Is it something that is nice to have or is it a tool that is essential for them to become more productive and enable firms to cut costs? Very few people will be implementing nice-to-haves in the next 18 months.” **CIS**

**Real-Time Reporting for the Contact Center**

Today's Service: **NT HE TH**  
Week Service Level: **1:19**  
Oldest Call Waiting: **8**  
Agents Available: **15**  
Staffed Level: **78%**

GROUP CIO ABN STF  
HLPDSK 1 3 28  
CUSTSV 3 1 1

- Improved Efficiencies
- Increased Customer Satisfaction
- More Effective Agents
- Reduced Contact Center Operating Costs

Deliver relevant real-time information to your contact center and begin realizing the results!

**FREE TRIAL SOFTWARE**

**SPECTRUM**  
CORPORATION

713-944-6200 • [cis@specorp.com](mailto:cis@specorp.com)  
©Copyright 2009 Spectrum Corporation. M114TR1108



By Joe Fleischer



## A Model Business

Why outsourcing is vital for the growth of the world's newest call centers.

**T**he start of 2009 represents an opportunity for call center managers throughout the world to reap the benefits of their economic interdependence by working together to identify and address the challenges they share.

An excellent source of information about these challenges comes from the Global Call Center Project, an international academic research group whose most recent report surveyed nearly 2,500 in-house call centers and outsourcers in 17 countries. Released in May 2007, the report is available on-line at [www.globalcallcenter.org](http://www.globalcallcenter.org).

If you've worked in or observed call centers during the last few decades, you may not necessarily be surprised by all the attributes the report says call centers share in common. Only 21% of the call center managers who responded to the survey come from centers that solely engage in outbound telemarketing; most centers answer incoming calls from customers. Most call centers assist their own customers directly; only a third of the survey respondents come from outsourcers. A large majority of respondents, 86%, are from centers that assist customers from the same countries or regions where they are located.

In my view, the most revealing of the report's findings are those about the differences among call centers. India's call centers, for example, are the most competitive, hiring only 7% of applicants, which is far lower than the 20% median selection rate among all centers the report surveyed. The report also points out that in India, where students require a minimum of three years to earn a college degree, 70% of call centers employ college graduates. Nearly all the agents whom Indian call centers typically employ are permanent, full-time workers.

Based on these observations, it would seem that in India, the position of a call center agent should be a sought-after job. Within the report, a challenge to this interpretation comes from call center managers' subjective responses to survey questions about how much judgment agents are allowed to exercise in how they communicate with customers and organize their time. On a five-point scale, where a higher number corresponds to more decision-making authority for agents, managers give agents' jobs an average rating of 2.6. According to the report, India has the highest percentage of agents whose roles that fall below the average rating, and "stands out as unique, with almost three quarters of the jobs offering very little opportunity for employees to make independent decisions about their work."

Further undermining the apparent appeal of Indian call centers is that compared to centers in other countries mentioned in the report, centers in India monitor agents' calls, and the effi-

ciency with which agents work, with the greatest frequency — typically more than once a week. On average per year, Indian call centers have the highest percentage of agents who voluntarily leave their jobs (20%) and the highest overall turnover rate among agents (39%). Close to 60% of agents in Indian centers remain in their jobs for less than a year.

Before we jump to a conclusion about how Indian call centers treat agents, and before we question why there is so much competition in India for jobs as agents, we should note several other facts. Of the Indian call centers surveyed, 73% assist international customers, by far the largest such percentage among countries in the report. Moreover, 80% of Indian call centers surveyed are outsourcers, which the report says in general tend to share characteristics that we so far have ascribed specifically to Indian call centers — frequent monitoring of agents, a high degree of standardization of work and a high rate of turnover among agents.

How can call centers that serve international customers emerge as sustainable businesses? To answer this question, we have to consider why, for instance, many Indian call centers are outsourcers. Call centers in India still represent a new phenomenon, and most of their customers are likely to come from outside the country. By operating as outsourcers, Indian call centers achieve economies of scale that make it possible for them to serve lots of customers among multiple locations at the same time.

Although adopting the outsourcer model enables call centers in India to thrive, it also introduces issues, especially those involving turnover, that have long afflicted call centers elsewhere. I believe that a key lesson we gather from the report is that the growth of call centers globally largely depends on the extent to which the outsourcer paradigm evolves from a business model to a model business for developing agents and serving customers. This subject will be the focus of my next column. **CIS**

*Joe Fleischer has written about the call center industry for more than 12 years. With Brendan Read, he co-authored the book *The Complete Guide to Customer Support*.*



## Report Finds Continuity Planning Important Trend for Top Performing Contact Centers

Contact center leaders often have more on their plates than most. Not only do these professionals have to ensure that their companies or divisions perform effectively, they also must do so within reduced budgets and cater to a consumer base that may or may not be interested in pleasant interactions.

One thing the contact center has very much in common with that of other businesses is the need to establish a business continuity plan. According to a recent Dimension Data report, such planning is the second top trend among forward-thinking contact center IT professionals. At the same time, many centers still have not prepared for system failures.

"Contact center productivity decreases by approximately 11% for every hour that real-time reporting is not available. In addition, service levels are significantly compromised when reporting systems go dark," said Tom Hubbard, CEO of Inova

Solutions, in a company statement. Inova Solutions is a contact center real-time reporting company.

"Call center professionals must be educated on mission-critical technology and high-availability solutions before there is a problem."

Responding after the fact can often result in poor service delivery for the customer, high stress situations for agents and overall loss of productivity and downtime. Customers and agents can be lost in the mess, yet all could easily be prevented. **CIS**

## Report Shows Strong Growth Anticipated in Caribbean Contact Center Market

The worldwide contact center industry will be interesting to watch over the next few years as the dynamics are sure to change dramatically. While domestic companies once turned to offshore outsourcing to reduce the cost of customer service in order to strengthen profit margins, this outsourcing is now a move to try and stay in business.

Not all companies are finding that moving customer service operations offshore is a viable or financially sound move. Many companies have made the move back to the U.S. with their customer service divisions simply because the indirect cost of creating frustrated customers was offsetting the promised financial gains from operating in a lower cost region.

This is not to say that every offshore location will deliver less than excellent service for domestic companies. Many offshore contact centers can in fact deliver better service than their U.S. counterparts. Dissatisfaction is instead often born of the impression that offshore support creates in the mind of the consumer — creating a less than satisfactory experience, no matter the quality of service.

For many domestic companies who have found that offshoring to the

other side of the world to be out of their bounds of their progressive strategies, another trend is emerging — that of nearshoring their customer service operations. According to a new report, the Caribbean is one area of keen interest.

The Caribbean Contact Center & BPO Report 2008-2010 is a newly updated report published on the Caribbean region by the Zagada Institute. This report shows that the Caribbean agent positions now number roughly 66,000 and is expected to exceed 101,000 by 2010.

The report also indicated that just over 90 percent of this growth is a result of service suppliers fulfilling projects for Fortune 1000 and large U.S. corporations. The report provides significant detail to show the factors driving the high level of satisfaction that U.S. corporate customers and their clients are report-

edly receiving from Caribbean vendors across regional markets.

The concept of nearshoring is gaining more and more attention as it can provide many of the same benefits that are offered by offshore locations, yet provides a closer proximity to corporate headquarters. This geographic consideration creates a perception of greater control over operations — whether it is actually true or not — and helps to drive satisfaction for the corporation.

As the economic situation continues to deteriorate, it is unclear as to the direction of the global contact center industry. One thing is for certain, companies that are able to survive will need to continue to support their customers and will need to do so as cost effectively as possible. For many, offshoring or nearshoring provides the logical answer. **CIS**



# Industry Leaders Share Their Views Regarding The Growth and Trends in the Contact Center/CRM Industries



Once a year, the editorial staff of Customer Interaction Solutions conducts a roundtable interview of industry leaders as a way of assessing the growth and prospects of the call/contact, CRM and teleservices industries. This year, we asked Avaya, Convergys, CosmoCom, Interactive Intelligence, InfoCision Management Corp, NICE, OpenSpan, SugarCRM, and Verint Witness Actionable Solutions to provide us with their valuable opinions on the direction of the industry. We're happy to share with you, our valued readers, the highlights of these companies' expert opinions. You can view the complete answers on our Web site [TMCnet.com](http://TMCnet.com)

First, companies were asked "In your judgment, by what percentage is the contact center industry expected to grow, and what is the reason for that growth?"

## Avaya

Until recent months, we saw industry growth at 12-15 percent. Recent economic activity leads us to believe the industry may remain flat for the year (No Growth) or more likely experience a slight decline.

## Convergys

We estimate at less than 10 percent. The current economic climate makes it more difficult to predict longer term growth in the industry, but we think we'll see moderate growth over the next several years. Companies are struggling to contain costs while their revenues decline, but customer demands will continue to evolve and become more complex. To compete, companies will need to provide higher levels of service through a range of online and offline channels and invoke some personalization into the experience through the use of business intelligence, analytics and technologies that integrate customer channels.

## CosmoCom

The industry as a whole is not going to grow much in 2009. But although the overall industry is flat, there are sharp growth curves hidden within it in two segments – the all-in-one IP platform, which enables TCO reduction and creates an ROI through consolidation, and the SaaS model, which will increase in popularity as companies seek to convert capital expenses (CapEx) to operating expenses (OpEx) in view of the economic climate. Since these trends are gaining market share against traditional strategies, the overall market does not grow, but there is a lot of growth for those who respond to these major trends.

## InfoCision Management Corp.

For the overall industry, we are predicting minimal growth, if any, for most of 2009. With the uncertain economy many organizations will cutback on their marketing budgets. Clearly only the fittest call centers will thrive and marginal result providers will face significant challenges. Expect more consolidation and for organizations to decrease their pool of preferred vendors.

## Interactive Intelligence

It is very difficult to make any predictions for 2009 given the economic climate. Clearly, things have slowed down from the 25 percent+ growth we saw for the last couple of years, but how much will it slow?

## NICE

In the current economic environment – it is very difficult to provide a specific demand projection for the market. We find that demand for contact center solutions continues to be strong, particularly in this uncertain time, as they help organizations nurture and protect their most valuable asset, their customer base.

The turmoil in financial services and other markets is translating to greater reliance on our systems. When everyone is worried about their personal finances – the first call they're making is to find out what's going on with their savings and investments. Some of our customers have told us they are seeing an increase of twenty percent to even 200 percent in calls coming into their call centers, branches and back offices. In





many cases, their call center systems are running at full capacity.

We are finding the demand for value-added offerings such as interaction analytics to be as strong as ever, as this high-value technology helps organizations better understand their customers and maintain a clear edge over competition. For example, one customer has been using our Interaction Analytics solution to categorize customer calls by topic to gain insight into why customers are calling. This level of analysis enables them to anticipate issues and respond more effectively and often leads to fewer calls overall.

### OpenSpan

We expect the industry to experience little or no growth in 2009 simply due to the global economical challenges. More than ever, the contact center industry will need to “do more with less” as customers will continue to demand high quality of service. Organizations will look to optimize or modernize their existing technology in order to improve the productivity of existing agents and improve customer satisfaction.

### SugarCRM

We see potential for growth by about 20 percent in the contact center market for three distinct reasons. First, the trend away from call center outsourcing back towards on-site call centers bodes well for the industry in general. Second, VoIP technology has made the cost of running a call center less, and also opened up the doors for home-based agents using VoIP softphones. Finally, open source applications, such as SugarCRM, are lowering the barrier to entry for businesses to create their own call centers. So, we are seeing actual organic growth as smaller businesses that previously could not afford to operate a call center able to create their own contact centers thanks to the convergence of these three trends.

### VerintWitness

Analyst estimates have generally been between eight and 10 percent, indicating that

the contact center industry will indeed continue to grow in 2009. The contact center remains the bridge between a company and the marketplace. In general, companies still rely on the direct customer feedback that is shared in the contact center to influence marketing campaigns/promotions, updates to products and services, and more.

For the next question, companies were asked “in your opinion, what is the greatest technological need of the contact center industry at this moment?”

### Avaya

The technology most in demand is data integration and normalization focused on improving customer satisfaction and contact center efficiency.

### Convergys

Analytics and relationship management technologies that balance agent-assisted and self-service options for customers are critical in giving customers the service they want, when and how they want it—whether that is by speaking with an agent on the phone, using a self-service option via a voice portal or mobile device or leveraging both on a single transaction.

Companies must understand customer preferences and utilize the right technologies to make this transition to a value-add model. It requires understanding why a call was made or what the drivers are for initiating a query or complaint.

To provide a proactive and seamless customer experience, companies need to know their customers and their pattern of behavior over time. So, it's important to have analysis of customer behaviors and intimate knowledge of call types and customer segments. How that information is deployed to agents at point of service is also very important.

### CosmoCom

The technology needs to catch up with the two major trends we highlighted earlier, the all-in-one IP platform and the SaaS/hosted contact center model. It will be a great year for the suppliers who do.

### InfoCision Management Corp.

Currently, business intelligence is one of our priority projects. One-to-one marketing is here to stay and the ability to provide clients with such solutions as data overlays, best-time-to-call technology, predictive modeling, data enhancement and customer profiles is a clear differentiator.

### Interactive Intelligence

We don't know if we'd categorize it as so much as a need versus “the greatest technological benefit.” And that focuses around the move to IP telephony. It provides overall cost savings, it better enables distributed environments and remote agents and it also facilitates the deployment of new, innovative applications.

### NICE

The greatest technological need in the contact center right now is for solutions that will help transform the contact center into a value-added profit center, rather than a cost center. To achieve this critical goal, contact centers need comprehensive solutions that integrate quality management (QM) integrated with interaction analytics, agent coaching and a post-call customer feedback solution. This integrated approach enables call center supervisors to dramatically improve service levels, resulting in increased customer loyalty – one of the requirements for sustainable profitability.

An integrated contact center solution enables supervisors to dramatically improve service levels by performing precision QM. This enables them to target specific customer interactions, as opposed to random sampling, for a better understanding of which agent behaviors contribute — or are detrimental – to customer satisfaction.

Taking this one step further, integration with a performance management solution can provide supervisors with a customer satisfaction dashboard that displays information about declines or increases in customer satisfaction scores, where integration with the call center's CTI system enables them to correlate lower scores to longer queue times. Further integration with a



workforce management solution enables supervisors to conduct coaching sessions at the optimal time, ensuring that the agent receives critical inputs without risking a conflict with peak-call hours, for example.

### OpenSpan

Desktop optimization solutions. Whereas in years past most contact centers were investing in new applications, today we find that they are looking to derive more value from their existing ones. The focus is shifting towards extending or modernizing existing applications instead of replacing or upgrading applications; automating processes across these applications and streamlining the way agents interact with applications so that they have immediate access to a 360° view of the customer. Improving agent effectiveness through desktop optimization is a hot area given today's "do more with less" mantra.

### SugarCRM

For the "mature" contact center market, I see the greatest need being software and VoIP-based technologies to replace outdated PBX and other expensive and unwieldy contact center components.

### VerintWitness

In today's business environment, the greatest technological need is for organizations to leverage eLearning and software that supports the coaching process. This area continues to present a challenge for many organizations worldwide. The contact center industry, in general, has done a poor job of creating an environment rich with learning and training opportunities for agents. This is especially important because the complexity of transactions has increased dramatically. Even further, budgets are being affected, and employees are being asked to do more in return. By placing more emphasis on training agents to effectively handle calls, companies can experience a direct connection and increase in establishing stronger customer loyalty.

Next, companies were asked: "What was the most important technology they used in 2008?"

### Avaya

Increasingly throughout the year, the blending of unified communications with customer service capabilities has driven important developments. The merging of multiple media – video, data, voice – and multiple modes of communications – e-mail, phone, SMS -- took important steps forward in 2008. This sets the stage for '09, in for helping customers reach the right expert (based in any location) faster, using any media channel, via inbound or outbound methods.

### Convergys

Customers are using all channels to access enterprises and demand more responsive service with shorter queue times, one and done resolution, and quick turn around on information. They are looking for proactive communications through notifications and mobile message alerts, and they want to choose how they interact.

Just this year, we've announced several clients using a new relationship management technology, Dynamic Decisioning Solution, to bolster customer satisfaction and control costs to serve through increased voice portal call containment, real-time personalization and segmentation. With the Dynamic Decisioning Solution and the recent launch of the [Intervoice](#) Voice Portal 6.0, we've taken the customer experience to a new level. These relationship management solutions enable the design, development, and deployment of secure and personalized speech-enabled self-service applications that deliver a consistent experience to customers across any channel.

### Interactive Intelligence

Interaction Client® from Interactive Intelligence: A desktop client that provides a great graphical interface to manage all communications.

### NICE

We have found that the introduction of interaction analytics packaged business

solutions is leading to a revolutionary approach for extracting important customer and business-related insights that help improve operational efficiency and overall customer experience.

Packaged Interaction Analytics business solutions provide organizations an innovative approach and quick turnaround in tackling some of their most pressing business issues. These solutions offer highly valuable integration with the organization's existing business processes where organizations can automatically analyze customer interactions and perform root cause analysis to identify potential problems and derive immediate insight into potential resolutions. These business packages constitute end-to-end, out-of-the-box solutions that include comprehensive reports, dashboards, and workflows that enable rapid deployment and provide an accelerated return on investment.

The first packaged solutions to be offered include: First Call Resolution Optimization, Average Handle Time Reduction, Decreasing Churn, and Improving Customer Satisfaction.

### OpenSpan

Virtualization and desktop integration technologies were two very important trends in 2008. Also, the game-changing technologies in business activity monitoring (BAM) mean you can reach out to all of the agents in the enterprise to monitor and report everything that happens on the desktop. Desktop BAM is here for 2009.

### SugarCRM

SugarCRM looks to use its own solution as much as possible internally to prove the value, and leveraging our own knowledgebase and self-service portal tools, we were able to continue to serve our thousands of customers in a consistent, multi-channel and cost effective manner.

### VerintWitness

The emergence of analytics – speech, data and customer feedback surveys – evolved in



2008. A unified, analytics-driven workforce optimization (WFO) solution that leverages critical information from customer interactions helps optimize workforce performance. It provides companies insight into customer experiences that might otherwise be difficult to obtain. Incorporating these types of analytics solutions helps transform raw data into actionable intelligence, enabling organizations to now only know what's happening, but why it's occurring.

Finally, roundtable participants were asked: "In your view will more contact centers that have left the US for nearshore and offshore come back or do you see them staying and grow offshore and nearshore, and why?"

### **Avaya**

Yes. There are two reasons some work will return to home shore. Some will come back due to the need for improved customer satisfaction and others will come back because of reduced volume creating more stranded capacity. It will make more economical sense to keep capacity in more expensive regions highly utilized. Attrition, which is one of the largest cost drivers in high cost regions will also improve due to higher unemployment rates, making work here more feasible.

### **Convergys**

We'll continue to see growth across the globe. Recent Convergys research indicates one of the top things customers want is to "speak with knowledgeable agents regardless of location." Many variables impact choice of location for call center work and different geographies provide different strengths in the business. For example, technical support has really evolved over the past 10 years and India has a strong base of engineering graduates that are well suited to this work. We have also opened new contact centers recently in North America and hired a large pool of home agents. We announced a significant expansion in The Philippines. While the location of a contact center is always driven by the unique needs of each client and type of work, we've seen overall growth in our call centers globally.

### **CosmoCom**

The real key is "right-shoring," which is a trial-and-error process. For some, that will mean moving or remaining offshore. For others, it will mean coming back onshore and using virtual contact centers that increasingly include home and informal agents in tandem with formal resources on and offshore. The beauty of virtual contact center technology is that it doesn't matter where the agents are.

### **InfoCision Management Corp.**

Some offshore contact center businesses are returning to the U.S., no question about it. There has and will continue to be a real shake-up of the Indian market. A call center is the voice of your company, so it's crucial to have mature, experienced professionals on the phones who can truly understand the regional and cultural nuances of your customers and donors. Companies that sacrifice call center quality for short-term savings in operations end up losing customers in the long run. Ultimately you want to look at the same things as you would on any outsource decision, paying special attention to important metrics such as talk times, wait time, reporting, security and lifetime value of the client interaction.

### **Interactive Intelligence**

We don't see a big change in this trend. Offshoring works for some and not for others, based on criteria such as language, time zones, complexity, costs, etc. We doubt we'll see a big shift in either direction.

### **NICE**

We expect that current off/near shore activity will stay as is but it seems as though in most cases companies will not initiate new offshore activity in 2009.

Outsourcing does have its challenges, especially when it's overseas and centers are staffed by a workforce whose native language is other than that of the clients' customers, requiring the implementation of very stringent quality assurance standards. The outsourcer needs to ensure control over processes and earn their

clients' confidence in the service levels that they provide to end customers.

An overseas outsourcer may also have special training requirements such as accent reduction, cultural differences, and the nuances of the callers' language. These challenges can easily be overcome with the right contact center solution. A solution that enables remote monitoring, for example, can provide clients with a comprehensive view of what is going on with the agents handling in- or out-going customer calls, in near real-time. Clients can save a lot of time and money by not having to physically be on the outsourcer's premises to conduct training, as it can be done from their home base – without compromising quality or reliability.

### **OpenSpan**

On the one hand, the trend was to move contact centers back on-shore, but it's likely to stall as the prices to outsource (personnel) are falling dramatically, given that the tough economic climate is global. Only time will tell if the trend to return on-shore continues but whether off-shore, near-shore, or on-shore it always comes back to optimizing desktops regardless of where agents reside.

### **SugarCRM**

We see a resurgence of U.S.-based contact centers however they are of a different makeup than what we have seen previously. Home-based agents, SaaS-driven call center operations, and more virtual call centers make creating, staffing and budgeting for a contact center initiative a lot easier for businesses of all sizes. The advancements in technology are creating a lot of opportunity for the contact center market, if it markets itself correctly.

### **VerintWitness**

There is now parity in cost for offshore, providing less reason to explore offshore territories. However, there are opportunities in the near shore with Latin America, which is becoming the new India. Some areas excel in the English language, and naturally also can cater to the growing Spanish-speaking population in the United States. **CIS**





# What's Ahead In The Workforce Solutions Industry?

Contact centers revolve around people: their *raison d'être* i.e. clients, customers, donors, patients, and students, and their staff. Over 70 percent of contact center costs are staff-related. Workforce solutions: from forecasting to scheduling and management enable contact centers to efficiently deploy their staff to ensure quality and cost-efficient service. Having the right people available at the right time, matching the supply of agents with specific skillsets with projected and planned contact volume including the needs for those skills is key to contact center success.



Hence workforce solutions, which from forecasting to scheduling and management enable contact centers to efficiently deploy their staff to ensure quality and cost-efficient service. Having the right people available at the right time, matching supply including people with specific skillsets with projected and planned volume is key to contact center success. Given the criticality of workforce solutions, we have contacted leading suppliers to find out what's ahead in their industry, and in turn, for contact centers.

**Aspect Software ([www.aspect.com](http://www.aspect.com))**  
**Bob Kelly, Vice President, PerformanceEdge Group at Aspect**

We see companies taking a more holistic view of workforce optimization solutions, not just forecasting and scheduling software, but combining agent training, quality monitoring and performance management solutions to drive improvements and efficiency in the contact center. Having a suite of solutions that work together is key. Performance and quality assessments are combined, leading to a targeted coaching process and increased agent training, while ensuring that time is being well spent by the supervisor, training the right people at the right time.

Unified communications is going to be an important contributor to the extension of workforce optimization to enterprise knowledge workers that are involved in assisting the contact center and to manage back office workers. This will allow companies to easily align and optimize resources across all customer service groups.

More companies understand the concept of a workforce lifecycle, rather than looking at performance optimization solutions as different pieces. The concept of a workforce lifecycle really ties together the whole process from hiring through training, staffing, performance and quality assessments and understanding where there are opportunities for efficiency and effectiveness improvement. Feedback from workforce optimization capabilities can be used to target the best hiring candidates, and the lifecycle continues.

The use of speech analytics, together with performance management analytics, can automate processes and give more complete customer insight. This is something we have seen emerging this year and we expect speech analytics and performance management analytics to accelerate in 2009 and into the future. Service oriented architecture is an important feature that can facilitate the ability to tie together multiple applications within the suite.

Training on using workforce tools is an important issue: workforce optimization software is becoming more complicated. Some companies using different interfaces for workforce management, quality management and performance management will have a tougher time training agents because they don't have a consistent view.

Additionally, managing agents and reports is more complicated because reports are being pulled from different tools from different vendors. When you have to learn three or four different applications and how to administer them, you don't have a holistic

view of patterns and trends to train agents. It's important that contact center agents are trained and organizations invest in training on an ongoing basis. For example, at the Aspect customer conference we run a number of sessions that provide very in-depth training classes for our customers, offering a view of technology and feedback from peers on where to make improvements.

**Calabrio ([www.calabrio.com](http://www.calabrio.com))**  
**Tim Kraskey, Vice President, Marketing and Business Development**

We see the mid-market segment continuing to outpace other markets for our business. We continue to package and bundle workforce features with other contact center applications (WFO, quality, performance management, real-time customer interaction) making it easier for contact centers to buy, maintain and integrate from a business process standpoint. Also, during trying times in the economy, WFM specifically can have a very fast payback and ROI. Having a more real-time view of staffing or human capital needs can save companies a great deal of money – having the right people in the right place at the right time.

Also, virtualization is driving the need to leverage commercially available solutions in order to manage multiple sites, time zones, and skills across wide geographies to more powerfully leverage IP networks. These suites of applications or services are moving beyond just WFO and adding the CTI/screen-pop agent and supervisor views of the customers' experience. We also see Web



2.0 architectures and bundling of other applications as being the definite direction of the market. Not just the WFO/ performance management applications, but also the real-time customer interaction tools and CTI/screen-pop. This is being driven by the push around performance, and the need to streamline tools and processes. Optimization takes place over time with traditional workforce optimization solutions, but the real-time element is critical and many improvements can and should be made in real-time - before it is too late. Consolidation of these tools becomes critical and contact centers don't want the extensive integration projects. They want it to work together out of the box and make only adjustments to the workflows that fit their business process.

Usability is key. Some tools are simply too complex to use successfully and inadequate training compounds the problem. Any product that requires more than the 2-5 days of training should raise a red flag. It is probably too complex.

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

**Jim Shulkin, Director of Marketing**

The most significant change we see occurring is the actual payoff to the promise the industry has been talking about for years, that being the reality of the contact center as a harbor for the exchange of valuable information with the rest of the enterprise, as much as it is an instrument to deliver and fulfill customer service.

The primary driver and use for advanced WFO solutions is resident in the contact center, as managers utilize it to optimize operations and deliver improved performance metrics and customer satisfaction scores. However, this is enabling centers to better understand, and for the first time in application, see the types of information that is available and really package and deliver it in ways that are easier to digest and more meaningful to other parts of the organization. This creates an opportunity for centers to improve on legacy performance standards while increasing the value-add of the function - a notion that's more important and vital to center managers now than maybe ever before.

One of the biggest trends we're seeing is the convergence of full-time and selective recording requirements. This has been facilitated by the elimination of cost barriers due to the adoption of solutions such as VoIP to a much more widespread preference for full time recording to achieve both the goals of compliance and quality, but also to gain valuable business trending and analytical information by capturing all the information available from customer interactions. The powerful analytical tools now available provide businesses with extremely useful information about their respective customers, markets and competition, in addition to trending information that is used to optimize center and business performance, reduce costs and increase business predictability.

We expect to see workforce management (WFM) made more of a priority for small/ midmarket firms and for the break even and ROI points on the technology to shift substantially downward in terms of number of agents required to see the returns more quickly. This will require WFM solutions to be easier to use, highly integrated with other WFO solutions (and able to integrate with tools of other vendors) and to deliver a more flexible and manageable TCO in smaller center environments.

Turnover is the nature of contact centers and therefore it's not always top of mind for management to formally schedule training on existing WFO technologies for new personnel. Because many of these people have experience or familiarity with other systems they often believe they don't need the formal training. But systems vary, as do user preferences, so they're typically not fully aware of the current technology's capabilities or able to fully or accurately utilize them as a result.

**NICE Systems ([www.nice.com](http://www.nice.com))**  
**Tom Butta, Chief Marketing Officer**

Workforce management solutions for the back office continue to grow, in part because of newly available technologies such as transaction monitoring and activity logging. Contact centers are applying workforce solutions to achieve goals that are strategic to the organizations, such as customer retention, as well as important

operational goals, such as cost efficiency through controlling average handle time.

Workforce management software must interact seamlessly with key systems in the contact center in order to access the necessary analytics to make smart business decisions. Bundling technologies such as call recording, analytics, and workforce and performance management, simplifies implementation and insures quality interaction between systems, reporting and results, often at a lower cost than by purchasing piece meal solutions.

**VerintWitness ([www.verint.com](http://www.verint.com))**  
**Bill Durr, Principal Global Solutions Consultant, Verint Witness Actionable Solutions**

There is growing interest in WFO in the small and medium size enterprise marketplace for the simple reason that the penetration into this market sector lags that of larger centers. There also is rising demand for this type of technology—workforce management and WFO in particular—across the broader enterprise.

It used to be that workforce management teams were thrilled to simply publish schedules that specified when agents were supposed to start and end shifts, and take their breaks and lunches. The trend seems clear: workforce management teams are doing much more sophisticated activity scheduling these days. In addition to start and stop, breaks and lunches other types of activities are now being optimally scheduled including team meetings, one-on-one coaching sessions, eLearning breaks, work in other media, project work, and a myriad off-phone activities.

We see a real failure on the part of user organizations to properly train software users who come into their positions after the vendor implementation training is long over. Anecdotally, we believe that 20 percent of the solution knowledge is lost with every employee that cycles through the system administration/use position. With turnover so high in contact centers, it is not unusual to find system users who are three and four people removed from the initial vendor training. Companies need to recognize that their greatest power and differentiation is in customer service. This is the reason why it's important to remain close to your vendor and take advantage of the courses offered. **CIS**

## 2009 Legislation/ Regulations Forecast

**T**he new Obama Administration and a stronger Democratic party control of Congress set in the midst of a struggling economy and foreign policy issues, has created an interesting environment for legislation and regulations affecting customer interactions both federally and at state levels.

While contact center-and-direct marketing-affecting issues such as offshoring, privacy, and telemarketing may have been pushed offstage, they are not out of the hall. Ironically, economic pressures may shove them back into the spotlight as governments, especially states, seek ways to keep jobs and revenue sources, which contact centers provide.

### Federal Legislation

Here is an examination of federal industry issues that lawmakers and regulators are and may be addressing in 2009:

- Offshoring

Federal lawmakers may reintroduce a bill similar to HR 1776, The Call Center Consumer's Right to Know Act, which would require contact center agents to disclose the physical location of such employee at the beginning of inbound and outbound calls. Firms would also have to annually certify to the Federal Trade Commission (FTC) their compliance with such requirement.

HR 1776 is an attempt to restrict offshoring by making customers aware that their calls may be going to or originating out of country. The bill's supporters hope customers and negative publicity would pressure firms to bring such jobs back to the U.S.

The downsides are that such bills may significantly add to contact center costs in both onshoring and time spent location disclosing and in compliance, which would ultimately be paid for by consumers. In doing so bills like it that hike contact center expenses may also be self-defeating as they may result in fewer domestic jobs.

Jerry Cerasale, Senior Vice President, Government Affairs, Direct Marketing Association believes HR 1776 will be reintroduced as another bill but does not think it will pass.

"I have not heard or seen a lot of activity on that legislation, because the outcry may be diminishing" he says. "It appears from discussions with DMA members that the move to off-shore call centers may be reversing without government help."

- Postage rate hikes

Looming is a planned postal rate hike on direct mail in mid-May that is expected to be between 4.5 and 5 percent; the exact rise will not be known until February when the US Postal Service (USPS) Board of Governor meets. The USPS is projecting a \$7 billion deficit in 2009-2010.

The postal service must pay \$7 billion to pre-fund retiree health benefits, which includes a prefund payment of unfunded 2006 liability of \$5 billion and \$2 billion for the current FY 2008 payment.

A large rate increase will directly impact contact centers because the higher mailing costs will lead marketers to reduce the volume of direct mail, which in turn lowers the amount of inbound calls in response to these offers and catalogs, explains Cerasale. This will also inconvenience customers by not informing them of new and valuable products and services and cost-saving special offers, which lead to less spending at a time when more is needed to boost the economy and to keep and hire employees.

In response the direct marketing and mailing groups and the USPS employees are working together to get the retiree pre-funding into the economic stimulus package.

- Privacy

Privacy advocates will likely press their Congressional supporters to introduce bills likely to restrict behavioral targeting; chiefly the ability of marketers to track which sites



buyers and prospects visit. Behavioral targeting, which the DMA's Cerasale says the cornerstone of direct marketing by providing information that enables firms to deliver relevant, targeted, and successful offers to existing and potential customers.

The House and Senate committees and the FTC have both taken a look at behavioral targeting. While there apparently was no federal legislation introduced in the last session, Congress did hold hearing on the subject, reports Cerasale, who expects that Congress will again review behavioral marketing in 2009. Proposed laws may range from outright banning of behavioral targeting to requiring customer notification that they are being tracked on given websites and to customer opt-in if they are on these sites.

Privacy advocates have been arguing that behavioral targeting restricts individuals' freedom to surf sites anonymously. The DMA and other similar organizations say that behavioral enables firms to cost-effectively inform customers and prospects about products and services that they are most likely to buy.

The DMA is working to create self-regulatory general principles on behavioral targeting in conjunction with other organizations such as the Electronic Retailers Association, to prevent restrictive legislation, reports Cerasale.

- Remote Selling

There will likely be renewed efforts by individual states and local governments that have sales taxes to get Congress to allow them to require marketers to collect taxes on contact center and Internet-made sales to their residents, businesses, and institutions, driven by budget pressures. 45 out



of 50 states have sales taxes. There are also some 7,000 taxing jurisdictions.

The Supreme Court ruled in the *Quill* decision in 1992 that individual states lack the authority to force firms that do not have a presence in a state to collect taxes on sales made to their residents because this affects interstate commerce and that falls under federal jurisdiction.

"These moves would, if Congress goes along, lead to a dramatic increase in expenses to sellers because these laws will require them create tax departments that will add to their costs at a time when they do not need any more burdens," says Cerasale. "Companies would be forced to become unpaid tax collectors for these jurisdictions."

The DMA official acknowledges that states and local governments are in a tough financial bind and that they do have a legitimate right to those taxes. He would like to see some form of cost-reducing centralization or other simplification of tax collection.

"Until there is simplification Congress should not even consider allowing taxes on remote sellers," says Cerasale.

#### • Telemarketing

Expect to see some legislation introduced removing exemptions in Telephone Consumer Protection Act (TCPA) granted to political parties in transmitting pre-recorded messages in the wake of bipartisan furor over incessant and annoying 'robocalling' during the 2008 election.

"Historically, campaign finance reform is a tough row to hoe to get legislation," explains the DMA's Cerasale. "There will be discussion but it remains to be seen if there will be actual action."

Going ahead is a Telemarketing Sales Rule (TSR) amendment requiring written express consent from existing customers including businesses to receive pre-recorded messages comes into effect Sept 1, 2009. The TSR until then and the TCPA allows pre-recorded messages to be delivered only to existing buyers.

The TSR change also includes requiring sellers and telemarketers to provide at the outset of all prerecorded messages, an automated keypress or voice-activated interactive opt-out mechanism that went into effect Dec. 1, 2008.

The DMA is expecting that the FTC will shortly implement a cleanup of the national Do Not Call (DNC) list. The FTC has brought in an independent contractor to delete abandoned phone numbers, such as those of people who have moved. The agency has told the DMA that they will drop as many as five percent of the landlines on the list immediately followed a half a percent per month, which fits approximately with how often individuals relocate.

"That should make telemarketing lists more accurate and give marketers the ability to call new movers with targeted offers, such for items and services for their new homes more readily," says Cerasale.

#### State Legislation

Expect the states to move on their own to hike and expand business taxes and fees to balance budgets and avoid raising general taxes or cutting popular programs. In addition to trying to collect remote taxes, the DMA Cerasale foresees state lawmakers increasing licensing taxes, restricting deductibility of advertising expenses, and taxing the value of advertising material, such as catalogs, sent into the states.

Even so, states have been and are expected in 2009 once again exercising their traditional role as close-to-the-people legislation leaders on national issues; it was the creation of state do not call lists that led to the national DNC registry in 2003.

#### • DNC for B2B

Expect a return of attempts to establish business to business (B2B) DNC registries. The UK allows businesses to register on its DNC list; a similar provision was pulled from Canada's DNC law before enactment in September 2008.

"The B2B DNC bills are usually filed at the request of very small businesses who are annoyed at getting telemarketing calls," explains Cerasale. "Such bills do have major problems such as who is authorized to put which numbers on the list. Also, businesses rely on the phones for business. Restricting B2B telemarketing calls with DNC lists will hurt everyone as well as provide one more expensive headache that firms do not need and will not by and large benefit from."

#### • IVR regulations

State lawmakers have been seeking to regulate IVRs, callbacks, and voicemail. Bills introduced in Florida, Missouri, New Jersey, New York, Oklahoma, Rhode Island include requirements for mandatory live agents, zero-outs for customers doing business with critical vertical markets. They include health insurers, cell phone companies, state agencies, telecommunication companies, and utility contact centers

#### • Offshoring

There may also be renewed attempts by states to limit offshoring. Bills introduced in Connecticut, Nevada, and Oklahoma would require agents to disclose their physical locations, with a couple going as far as disclosing their city, state, and country. Bills introduced in Minnesota would require calls handled offshore to be transferred to US contact centers. Some proposed state laws would prohibit personal information being sent overseas.

The American Teleservices Association is understandably concerned with such state moves in what should be federal areas as they add to the cost and difficulties of doing business with marginal benefit to consumers. It is hoping that the Obama Administration will reassert federal jurisdiction in regulatory territory that should be its exclusive realm while encouraging industry self-regulation to crack down on poor corporate practices that annoy consumers and business that will together avoid needless legislation.

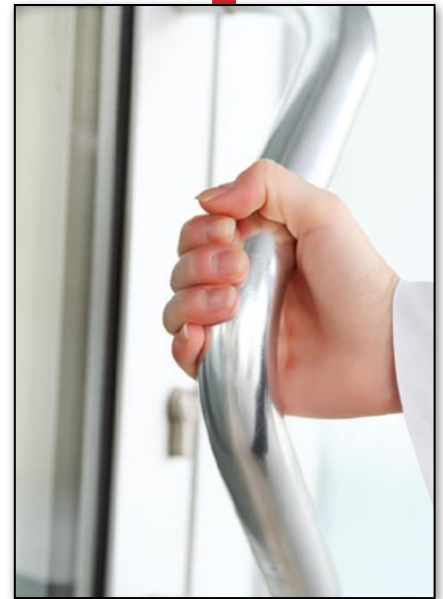
"For a number of years the state regulatory authorities have enjoyed the latitude to diverge or singularly increase regulatory mandates beyond Federal measures yet the abuses at the corporate level have been uninhibited," says ATA CEO Tim Searcy. "Our goal, as has been evidenced

in the past, is to return exclusive regulatory control to the Federal level. The upcoming year may spell such events if the impending administration stands behind its pledge to admonish questionable corporate behavior. We therefore, encourage the efforts to reinstitute a consistent scope of regulatory control based on Federal policies." **CIS**



# Opening the Door to Open Source

Open source software, which is written with source code that is widely available with little or no proprietary copyrights, is now entering contact centers and for several good reasons. These chief ones include lower (up to 40 percent) pricepoints, ease of customization, many new solutions, and the coming of age of these applications to endure demanding communications environments.



Open source delivers these benefits because there are no licensing costs as there is with proprietary software and it has spawned a large and growing community of developers who believe in the concept. Open, though, does not necessarily mean 'free'. While there is open-source-written freeware available directly via the Web, most applications that can meet the demanding needs of contact centers are packaged, hosted/delivered and supported by suppliers for fees. Those vendors typically offer a mix of core paid and free features.

There is as a result a gradually widening array of contact center-suitable solutions and customizations written in or based on open source. They include ACDs, business intelligence, call recording, CRM, and message handling. They also support more applications and provide more functionality. For example OrecX, which makes open-source-based call recording solutions, has upgraded its Oreka TR product to support speech analytics, thereby increasing the ability of contact centers to process call data and uncover hidden value.

The cost savings from these solutions are not insignificant. OrecX says its tools are available for fraction of the cost of proprietary recording applications that often run \$1,000-\$4,000 per user.

Observers say that it will be awhile before open source catches up with proprietary software in the ability to power heavy-duty applications such as robust ACD, IVR, predictive dialing, speech recognition, and workforce management. Yet the trend is pointing in that direction. The suppliers that are basing their products on open source have developed business models that will enable them to

create, market, and support their wares without the profit protections of copyright. At the same time, tech-savvy firms can customize and create their own contact center applications with open source via the community if there is not an out-of-the-box solution readily available.

"At the heart of open source is a large community of people who believe in cooperating to solve problems with software technology," says Natalie Petouhoff, senior analyst [Forrester](#) Research. "Because open source is not costing the enterprise any or very little, contact centers and their IT departments can develop applications for and with the open source community to give the functionality they are looking for. There is therefore less need to buy proprietary solutions."

## Open source customer benefits and challenges for contact centers

Open source software has several key customer-interaction-supporting benefits. The lower development costs enable creation of personalized messaging and customized customer service workflows, says Martin Schneider, Director, Product Marketing, SugarCRM. These applications enable firms to differentiate themselves on service, not always on price, by providing customers with value-rich experiences.

In contrast, customizing the environments in the older proprietary models is very expensive and time consuming, he points out. Firms must talk with vendor partners, systems integrators, and consultants about what they want and what the solutions can deliver. Once there is agreement there is development and testing. None of these comes cheap: firms are charged for integration work while additional licenses may be needed for new modules.



"In today's highly competitive and economically difficult marketplace you can't afford to have your competitors beat you to the market with new products and services or deliver truly amazing customer experiences," Schneider points out. "With open source you can get at it the tools, run and test development environments quickly, and get the applications live ASAP at very little cost."

The less expensive development environments have permitted suppliers to more easily create new and enhance their existing solutions. Szeto Technologies' Call Linx call routing and message handling solution is built on the Linux operating system. The firm also uses Linux-based free application software such as PostgreSQL to manage the database, which it found rivals and outperforms commercially available counterparts.

Open source can make a substantial difference in product versatility. Schneider says that the purely open integration framework and interface in Sugar CRM 5.2, which taps business and social sites, enables users to easily bring in multiple data sources into their CRM systems.

"Also, with open APIs (application programming interfaces), it is easier to link SugarCRM to any data feed or source, since there is no proprietary code that must be learned prior to performing a data synch between Sugar and say a data provider like Hoover's or [Facebook](#)," adds Schneider.

Forrester's Petouhoff adds that open source solutions enables contact centers easily and quickly keep their applications in step with changing needs, as opposed to buying proprietary tools that require lengthy approvals from senior management. For example it sometimes takes three years: from needs assessment to going fully live for contact centers to get the functionality they need from CRM applications.

Open source software also provides built-in buyer protection. If the firm that wrote an application with open code discontinued that version or went out of business, developers can more easily create tools to continue supporting and expanding on it than if it were written to proprietary code.

"In contrast with open source you have a large community of developers to keep your applications going and growing," says Petouhoff.

The combination of features and affordability with open source-based solutions now enables many especially smaller contact centers to justify leading edge customer-service enhancing functionality such as skills-based routing and unified communications (UC), and CRM. In many cases they provide far superior features compared with proprietary technologies. **CIS**

## Avaya's Blended Open Source/ Proprietary Approach

Open source software provides a substantial and growing amount of low-cost functionality for a wide range of applications. Examples include analytics, business intelligence framework, and content knowledge management.

Yet open source may be a fair ways off before it can match already-developed proprietary software for complex rugged, cannot-fail purposes such as analytics, heavy-volume skills-based routing, IVR, and outbound productivity say many industry observers and practitioners.

"Companies are not yet comfortable in putting the crown jewels: their customers, in the open-source environment," says Bob Lyons, Vice President and General Manager of Contact Center Solutions, Avaya. "Having said that, open source has come far enough along for less critical but value-rich applications."

Avaya will be rolling out a series of new and upgraded solutions based on this approach of blended open-source and proprietary software, based in part from using open source software for more than 5 years to develop, prototyping and testing products quickly.

It will be releasing early in 2009 Pentaho's open-sourced based business intelligence analytics for its CMS reporting tool, which it says are ideal for handling low to moderate amounts of data. It will then launch in late 2009 a new version of its Interaction Center product. The solution will be comprised of its core IVR, ACD, and contact management proprietary software surrounded by a constellation of other add-on free-add on features written to open source such as content management.

"We are trying to build an eco-system around our products that leverages open source," explains Sheldon Davis, Director, Architecture and Engineering, Contact Center Solutions, Avaya. "In this fashion we can give some software away that works well with our products. This lets the open source community pull through our core products by supporting each other in the use of these free technologies that integrate well with them."





Fonality, which makes open-sourced-based PBX and UC solutions, now offers the Unified Agent Edition (UAE) which provides the ability to directly link voice into CRM applications at a fraction of the cost of custom integrations. UAE is integrated with Salesforce.com, but may be partnered with other CRM offerings in the future.

Fonality has found a large and growing receptivity to its products amongst contact centers because they can provide an extensive range of features at lower pricepoints.

"Since we launched our PBX/UC solution three years ago we've almost created this new market called the 'micro call centers': with less than 20 agents," explains Fonality CEO and Founder Chris Lyman. "We can come with 60 percent of the functionality of a competing proprietary solution for 10 percent of the cost."

is typically written with service-oriented architecture, which permits easier data communications between applications.

"Open sourced applications, if they have not been around as long as their commercial brethren, will typically not have a long tail of backward compatibility features, as they are designed to support standardized, and often more modern, protocols," explains Lyman.

The relative lack of packaged open source applications as compared with proprietary tools in the contact center space means that if you want to stay with the open source model you may have to develop or reach out to the development community to create them. Or wait until suppliers build them, which may not be that long; check out TMCnet.com frequently for the latest open source solutions.

"The open source community and firms packaging these solutions will get there in time because more people

Schneider is seeing more firms create call recording, CTI screen pops, and quality management applications using open source applications like Sugar to solve specific needs. One SugarCRM partner, Tau Space out of South Africa, is leveraging the open Sugar platform to create various high volume contact center solutions for its customers.

These applications are built from code 'stacks'. The most popular one for contact centers is LAAMPS, which stands for Linux, Apache, Asterisk, MySQL, PHP, and Sugar CRM. This stack has a free CRM application which gives you knowledge base, management tools, sitting on top of telephony.

"With LAAMPS contact centers do not have to build these core applications themselves," explains Schneider. "Instead they can add an increasing array of functions that are similar to proprietary tools that companies like Aspect and VerintWitness are putting out there for six-seven figures that they get for a few dollars per month for hosting and support fees." **CIS**

**Open sourced applications, if they have not been around as long as their commercial brethren, will typically not have a long tail of backward compatibility features, as they are designed to support standardized, and often more modern, protocols.**

*Fonality CEO and Founder Chris Lyman*

### Open-source cautions

The new Fonality/Salesforce.com release points to one of the cautions with using open source-based applications: a potential lack of out-of-the-box compatibility with other especially legacy solutions that contact centers may have. Yet as these applications become obsolete and are phased out, replaced by more modern software, this will become less of an issue. Newer software

are realizing that there are amazing opportunities in going to firms that are used to paying \$3,000 to \$10,000 per agent per year in license fees and say 'we can cut that by 90 percent', "explains Schneider.

DIYing your open source solutions may be easier than one may think, and the cost savings may be sufficiently high compared with buying proprietary tools to justify the IT resources.

The following companies participated in the preparation of this article:

**Avaya**  
[www.avaya.com](http://www.avaya.com)

**Fonality**  
[www.fonality.com](http://www.fonality.com)

**Oreco**  
[www.oreco.com](http://www.oreco.com)

**Pentaho**  
[www.pentaho.com](http://www.pentaho.com)

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

**Szeto Technologies**  
[www.szeto.ca](http://www.szeto.ca)



## Speaking With Eagle.net Founder Kent Charugundla



**T**MC President Rich Tehrani recently spoke with Kent Charugundla, a well-known telecommunications entrepreneur and founder of the Eagle.net families of companies. Along with his experience in this field, he is also philanthropist well known for his contributions to various non-profit organizations as well as museums in the United States. Kent is also a recipient of several awards including the “Lifetime Achievement” award for his contributions in the telecom industry.

**RT:** What is your view on community support in the U.S. and India and what actions have you taken?

**KC:** I believe that in order to make the world a better place for us, and for our future generations, we all need to help our community and maintain our civic responsibilities. I consider myself extremely fortunate to be able to offer my civic and moral responsibility back to society.

My wife Marguerite and I started pondering a few years ago how we could make a major contribution in the coming years to social welfare. Humbly we decided to partake in charity work during the Katrina hurricane disaster in 2005 to support victims as well as organizations that had been providing aid to these sufferers. We offered our U.S.-based teleconferencing services free to both victims as well as non-profit organizations. Also, about a year ago, my wife and I founded Tamarind Arts Council (TAC), a non-profit organization dedicated to promoting art of Indian influence in North America. Our focus is to support all types of artistic expression, including performing and fine arts inspired by the arts of India. In addition to hosting artist interviews, producing art shows, and providing a creative outlet for performance artists, Tamarind Arts Council sponsors various art related activities and cross-cultural events throughout the year such as: film screenings & lectures, cultural dance performances, book launches and readings, artist performances, and Indian musical concerts. These events stir the interest of a wide variety of audiences to the Indian art scene. The Tamarind Arts Council provides fellowships and scholarship opportunities and we have also established an outreach program to art schools in India, which aims to maintain and improve art universities, while also creating a channel for creative connections between India and the U.S.

Tamarind Arts Council exemplifies how life can indeed revolve around the arts. Furthermore, our mission is to inspire the work of contemporary Indian artists and performers, to facilitate public appreciation of these unique cultural art forms and create dialogs between artists in India and the United States through a number of cultural programs and exchanges.

**RT:** What is your view on technology for non-profit organizations?

**KC:** For better or worse, the technological world is here to stay and the global society is being divided into two groups: the “communication rich” and the “communication poor.”

Because the Internet and telecommunications industry have profoundly affected the modern workplace and professionals in all fields are expected to be ‘Information and computer literate,’ emailing, teleconferencing, faxing, instant text messaging, and the cell phone cannot be overlooked. I believe we should provide the same tools to non-profit organizations so that they are not left behind.

As part of the telecom industry, we are very conscientious of our responsibility to society as a whole and feel that the time has come for us to deploy information and communications technology knowledge, tools, and experience towards solving the needs of the larger community in India. In the business world, face-to-face meetings produce the optimum results but in most cases it is not practical. Teleconferencing is a practical, secure, and economic business tool, available 24 hours/7 days a week.

We would like to bring these communications tools to non-profit organizations and work with other partners so that the full spectrum of available technologies can be provided to non-profit organizations.

**RT:** How does conferencing help the productivity of non-profit organizations?

**KC:** Teleconferencing is a turnkey solution and powerful productivity tool for non-profit organizations since objectives can be achieved without a face-to-face meeting. Telephone conferencing cuts operating costs, saves time (and as we all know, time is money), and saves cash flow that can be used for higher charitable priorities. It makes sound business sense to spend money wisely when it comes to daily, weekly, monthly, quarterly and annual business telephone conferencing.

Conferencing is also a solid personal productivity tool to conduct business. In today's competitive business environments, organizations around the world are searching for better and innovative ways to get the most of their meetings. We make it easier, and far more valuable and effective to collaborate with co-workers, partners, and customers locally and globally. It should be emphasized that audio conferencing is an enhancement to business communications, not a replacement.

**RT:** What are your future plans for serving the community?

**KC:** We are currently working with TechSoup in San Francisco to provide global conferencing to Indian non-profit organizations. We would like to offer free global conferencing to U.K. based non-profit organizations or donors who are working with Indian non-profit organizations. We are in the planning and implementation stages with the Charity Technology Trust of the U.K.

As you know, non-profit organizations are under constant financial pressure to manage their operating budget. We believe that this donated service will enhance communications and more specifically international conferencing. We will also continue to explore ways to bring technology to non-profit organizations. **CIS**



## The 2008 Customer Interaction Solutions Product of the Year Awards



Each year, Customer Interaction Solutions magazine bestows its Product of the Year awards on companies that have demonstrated excellence in technological advancement and application refinements. Listed here are products and services that we've judged to have gone the extra mile to help improve both the customer experience and the ROI for the companies that use them. It is these companies' contributions that lead the way in making the contact center technology industry the dynamic field that it is today.

Congratulations to this year's crop of winners! **CIS**

– The Editors

Company Name	Web Address	Product Name
Allegiance, Inc.	<a href="http://www.allegiance.com">http://www.allegiance.com</a>	Allegiance Engage platform
Alloy Software, Inc.	<a href="http://www.alloy-software.com">http://www.alloy-software.com</a>	Alloy Navigator
AMTEI INC.	<a href="http://www.amtelnet.com">http://www.amtelnet.com</a>	TIMS (Telecom Information Management System)
Aplicor, Inc.	<a href="http://www.aplicor.com">http://www.aplicor.com</a>	Aplicor Enterprise, Version 5
Aspect Software	<a href="http://www.aspect.com">http://www.aspect.com</a>	PerformanceEdge
Autonomy	<a href="http://www.etalik.com">http://www.etalik.com</a>	Qfiniti Explore
Avaya Inc	<a href="http://www.avaya.com">http://www.avaya.com</a>	Proactive Outreach for Financial Services
Bomgar Corporation	<a href="http://www.bomgar.com">http://www.bomgar.com</a>	Bomgar Box
BrandonWayne Group, LLC.	<a href="http://www.CallCenterWorkforce.com">http://www.CallCenterWorkforce.com</a>	Call Center Response
BT Americas	<a href="http://www.btglobalservices.com">http://www.btglobalservices.com</a>	BT Virtual Collaboration Room
Callfiniti, Inc.	<a href="http://www.callfiniti.com">http://www.callfiniti.com</a>	ContextIP
CallMiner, Inc.	<a href="http://www.callminer.com">http://www.callminer.com</a>	CallMiner Eureka!
Chordiant Software, Inc.	<a href="http://www.chordiant.com">http://www.chordiant.com</a>	Chordiant Collections Manager 2.0
Chordiant Software, Inc.	<a href="http://www.chordiant.com">http://www.chordiant.com</a>	Chordiant Cx Visual Business Director (CxVBD)
Cicero Inc.	<a href="http://www.ciceroinc.com">http://www.ciceroinc.com</a>	Cicero 6.4
Citrix Online	<a href="http://www.citrixonline.com">http://www.citrixonline.com</a>	Citrix GoToAssist Express
Citrix Online	<a href="http://www.citrixonline.com">http://www.citrixonline.com</a>	Citrix GoToWebinar 2.0
Citrix Online	<a href="http://www.citrixonline.com">http://www.citrixonline.com</a>	Citrix GoToMeeting 4.0
Clear C2, Inc.	<a href="http://www.c2crm.com">http://www.c2crm.com</a>	C2CRM
ClickFox	<a href="http://www.clickfox.com">http://www.clickfox.com</a>	ClickFox Customer Experience Analytics (CEA)
Consona Corporation	<a href="http://www.consona.com/crm">http://www.consona.com/crm</a>	Consona CRM Suite (formerly Onyx & KNOVA)
CosmoCom	<a href="http://www.cosmocomb.com">http://www.cosmocomb.com</a>	CosmoCall Universe 5.2
CRM Integration Systems, Inc.	<a href="http://www.calloncrm.com">http://www.calloncrm.com</a>	Call On CRM for ACT!
CyberTech International	<a href="http://www.cybertech-int.com">http://www.cybertech-int.com</a>	CyberTech Pro
eGain Communications Corporation	<a href="http://www.egain.com">http://www.egain.com</a>	eGain Web Customer Experience Suite





Company Name	Web Address	Product Name
Empirix Inc.	<a href="http://www.empirix.com">http://www.empirix.com</a>	OneSight for Contact Centers
Enkata	<a href="http://www.enkata.com">http://www.enkata.com</a>	Enkata Strategic Service Suite
Envision Telephony, Inc.	<a href="http://www.envisioninc.com">http://www.envisioninc.com</a>	Envision Centricity
Epicor	<a href="http://www.epicor.com">http://www.epicor.com</a>	Epicor 9
Five9, Inc.	<a href="http://www.five9.com">http://www.five9.com</a>	Five9 Virtual Call Center Suite
Fonality	<a href="http://www.fonality.com">http://www.fonality.com</a>	PBXtra Unified Agent
FrontRange Solutions	<a href="http://www.frontrange.com/">http://www.frontrange.com/</a>	FrontRange Voice
FurstPerson, Inc.	<a href="http://www.furstperson.com">http://www.furstperson.com</a>	CC Audition – Home Agent Edition
Genesys-Informiam Product Line	<a href="http://www.informiam.com">http://www.informiam.com</a>	Genesys-Informiam Product Line 2008
GMT Corporation	<a href="http://www.gmt.com">http://www.gmt.com</a>	GMT Planet, version 9.7
GN Netcom	<a href="http://www.jabra.com">http://www.jabra.com</a>	GN 9125
GN Netcom	<a href="http://www.jabra.com">http://www.jabra.com</a>	Jabra M5390 Multiuse
IEX, a NICE Systems company	<a href="http://www.iex.com">http://www.iex.com</a>	IEX TotalView Workforce Management
Infusionsoft	<a href="http://infusionsoft.com/">http://infusionsoft.com/</a>	Infusionsoft
InnoPath Software	<a href="http://www.innopath.com">http://www.innopath.com</a>	InnoPath Active Care
InsideSales.com	<a href="http://www.INSIDEsales.com">http://www.INSIDEsales.com</a>	PowerDialer for Salesforce.com
Interactive Intelligence Inc.	<a href="http://www.inin.com">http://www.inin.com</a>	Customer Interaction Center (CIC)
Interactive Softworks, Inc.	<a href="http://www.interactivesoftworks.com">http://www.interactivesoftworks.com</a>	Metaphor
Interactive Softworks, Inc.	<a href="http://www.interactivesoftworks.com">http://www.interactivesoftworks.com</a>	VoiceNet
Intuitive Voice Technology	<a href="http://www.intuitivevoice.com/">http://www.intuitivevoice.com/</a>	Evolution PBX
InVision Software AG	<a href="http://www.invisionwfm.com">http://www.invisionwfm.com</a>	InVision Enterprise WFM
IPitomy Communications LLC	<a href="http://ipitomy.com/">http://ipitomy.com/</a>	IPitomy Communications IP2000E w/ Call Center
KANA	<a href="http://www.kana.com">http://www.kana.com</a>	KANA Suite version 10.4
KnoahSoft, Inc.	<a href="http://www.knoahsoft.com">http://www.knoahsoft.com</a>	Harmony Suite v2.0
LiveOps	<a href="http://www.liveops.com">http://www.liveops.com</a>	LiveOps On-Demand Call Center Platform
Merced Systems, Inc.	<a href="http://www.mercedsystems.com">http://www.mercedsystems.com</a>	Merced Systems Enterprise Sales and Service Performance Management Solutions
Mindshare Technologies	<a href="http://www.mshare.net">http://www.mshare.net</a>	Mindshare
Mitel	<a href="http://www.mitel.com">http://www.mitel.com</a>	Mitel Customer Interaction Solutions
NetSuite Inc.	<a href="http://www.netsuite.com">http://www.netsuite.com</a>	NetSuite OneWorld
Nexidia, Inc.	<a href="http://www.nexidia.com">http://www.nexidia.com</a>	Enterprise Speech Intelligence (ESI) 7.0
NICE Systems Ltd.	<a href="http://www.nice.com">http://www.nice.com</a>	NICE SmartCenter
Noble Systems Corporation	<a href="http://www.noblesys.com">http://www.noblesys.com</a>	Noble Composer Web Agent
Novo Technologies inc.	<a href="http://www.novo.ca">http://www.novo.ca</a>	NovoLog Suite
NTRglobal	<a href="http://www.ntrglobal.com/en/home.asp">http://www.ntrglobal.com/en/home.asp</a>	NTRadmin with AdminBots
NTRglobal	<a href="http://www.ntrglobal.com/en/home.asp">http://www.ntrglobal.com/en/home.asp</a>	NTRsupport with First Help
Nuance Communications	<a href="http://www.nuance.com">http://www.nuance.com</a>	Mobile Care
Nuance Communications	<a href="http://www.nuance.com">http://www.nuance.com</a>	Nuance Notification Hub
Numara Software	<a href="http://www.numarasoftware.com">http://www.numarasoftware.com</a>	Numara FootPrints 9
PanTerra Networks	<a href="http://www.panterranetworks.com">http://www.panterranetworks.com</a>	WorkSuite Call Center



Company Name	Web Address	Product Name
Parature, Inc.	<a href="http://www.parature.com">http://www.parature.com</a>	Parature Customer Service Software
Parus Interactive	<a href="http://www.parusinteractive.com">http://www.parusinteractive.com</a>	ParusSpeak Speech Auto Attendant
PhoneFusion	<a href="http://www.phonefusion.com">http://www.phonefusion.com</a>	PhoneFusion Call Center Edition
Pipkins, Inc.	<a href="http://www.pipkins.com">http://www.pipkins.com</a>	Real Time Adherence Global
Presence Technology	<a href="http://www.presenceco.com">http://www.presenceco.com</a>	Presence OpenGate
PreVisor	<a href="http://www.previsor.com">http://www.previsor.com</a>	PreVisor Contact Center Solution
Pronexus Inc.	<a href="http://www.pronexus.com">http://www.pronexus.com</a>	VBVoice 5.6
Resolvity, Inc	<a href="http://www.resolvity.com">http://www.resolvity.com</a>	Resolvity Speech Application Platform
RingCentral	<a href="http://www.ringcentral.com">http://www.ringcentral.com</a>	RingCentral
Sage CRM Solutions	<a href="http://www.sagecrmsolutions.com">http://www.sagecrmsolutions.com</a>	Sage SalesLogix v7.5
Sage CRM Solutions	<a href="http://www.sagecrmsolutions.com">http://www.sagecrmsolutions.com</a>	ACT! by Sage 2009 (11.0)
salesforce.com	<a href="http://www.salesforce.com">http://www.salesforce.com</a>	Salesforce CRM Customer Service & Support
salesforce.com	<a href="http://www.salesforce.com">http://www.salesforce.com</a>	Salesforce CRM
SAS	<a href="http://www.sas.com/">http://www.sas.com/</a>	SAS for Customer Experience Analytics
Sennheiser	<a href="http://www.SennheiserUSA.com">http://www.SennheiserUSA.com</a>	VMX Office
SER Solutions, Inc.	<a href="http://www.ser.com">http://www.ser.com</a>	ENSERCLE Contact Management Solution
Siemens Enterprise Communications, Inc.	<a href="http://www.siemensenterprise.com">http://www.siemensenterprise.com</a>	OpenScape Contact Center
SoundBite Communications	<a href="http://www.soundbite.com">http://www.soundbite.com</a>	SoundBite Intelligent Communications Platform
SugarCRM	<a href="http://www.sugarcrm.com">http://www.sugarcrm.com</a>	SugarCRM
Sword ciboodle	<a href="http://www.ciboodle.com">http://www.ciboodle.com</a>	Sword ciboodle
Symon Communications, Inc.	<a href="http://www.symon.com">http://www.symon.com</a>	Symon InView
Syntellect	<a href="http://www.syntellect.com">http://www.syntellect.com</a>	Syntellect CIM
Talisma, an nGenera Company	<a href="http://www.talisma.com">http://www.talisma.com</a>	Talisma Knowledgebase 8.1
TechExcel	<a href="http://www.techexcel.com">http://www.techexcel.com</a>	CustomerWise
Tigerpaw Software, Inc.	<a href="http://www.tigerpawsoftware.com">http://www.tigerpawsoftware.com</a>	Tigerpaw CRM+
Toshiba America Information Systems, Telecommunication Systems Division	<a href="http://www.telecom.toshiba.com">http://www.telecom.toshiba.com</a>	Toshiba Net Phone 6.0
Transera	<a href="http://www.transerainc.com">http://www.transerainc.com</a>	Seratel
TuVox	<a href="http://www.tuvox.com">http://www.tuvox.com</a>	TuVox Personalization Module
UCN, Inc	<a href="http://www.ucn.net">http://www.ucn.net</a>	inContact
Ulysses Learning	<a href="http://www.ulysseslearning.com">http://www.ulysseslearning.com</a>	CallMentor
Unica Corporation	<a href="http://www.unica.com">http://www.unica.com</a>	Affinium Campaign Interact 7.5
Upstream Works Software Ltd	<a href="http://www.upstreamworks.com">http://www.upstreamworks.com</a>	UpStart Version 2.0
UTOPY	<a href="http://www.utopy.com">http://www.utopy.com</a>	UTOPY SpeechMiner
Varolii Corporation	<a href="http://www.Varolii.com">http://www.Varolii.com</a>	Total Solutions
Verint Witness Actionable Solutions	<a href="http://verint.com">http://verint.com</a>	Next-Generation Impact 360 Workforce Optimization
Virtual Hold Technology, LLC	<a href="http://www.virtualhold.com">http://www.virtualhold.com</a>	Virtual Hold Encore
VXI Global Solutions, Inc.	<a href="http://www.vxi.com">http://www.vxi.com</a>	VisionSuite Software



## CRM, The Tampa Bay Rays and Detroit Lions



One thing about following CRM as a full-time beat is how much latitude there is for professional research. Everybody's a customer, everybody has opinions on customer service, and everybody applies the principles of CRM to other parts of their lives.

Take one of the most popular industries in America today, professional sports. If the principles of CRM are true as they apply to customers in the B2C and B2B environments where they're usually applied, they're also true for customers as people doing other things with their time — following sports teams, choosing schools for their kids, voting,

San Francisco-based CBS Sports columnist Ray Ratto ([www.tmcnet.com/2645.1](http://www.tmcnet.com/2645.1)) is certainly nobody's idea of a CRM writer. But he's a heck of a good sportswriter, as just as the CRM writer can use sports to illustrate CRM, a good sportswriter can use CRM to illustrate sports. Simply translate "fans" as "customers," "games" as "products," "team owners" as "vendors" and see if the principles apply.

What's the basic principle of CRM? That if you don't treat your customers better than the next guy, offer them better products, services and prices than the next guy, that they'll take their business to... the next guy.

When looking at why fans (i.e., "customers," see above) buy tickets or team paraphernalia, the motivation isn't hard to find: They want to enjoy themselves identifying with the team brand. One goes to a sporting event to participate vicariously in the ancient battle of good vs. evil, to place yourself in the narrative unfolding on the field — fans say "We're winning!" not "Those millionaires in the red uniforms are beating those other millionaires in green uniforms!"

So the customer value proposition in sports is pretty simple. Give fans a good fantasy, which lets them "win" a reasonable number of times. Sell jerseys to identify fans with specific individuals on the team and you'll make money like a toll road.

But the one big difference between sports and retail, as Ratto notes, is that in sports the fans have far less influence on the team owners and the quality of their team's product than customers have over vendors and the quality of their products. This is because sports teams are essentially monopolies, with a few regional exceptions — New York has reasonable alternatives for sports fans tired of seeing one team lose all the time, in the South the NFL has always faced steep competition from college football for the fan's wallet.

So whereas with the vast majority of products usually considered by CRM writers — you can always turn into Starbucks or walk a few doors down to the next coffee shop, buy this car or that, order from this supplier or that, read this author or that — with professional sports, the choice is frequently stark: This 'sucky' team or nothing.

And when fans take Door #2, Ratto notes, when the stadium for Tampa Bay Rays games is mostly empty, it gets ownership's attention in a way that nothing else does. Forget showing up to the stadium with a bag over your head or to hold up a protest sign, you're still buying a ticket. Forget mouthing off to a radio show, owners don't care. Forget wearing team jerseys with a big "X" on them, the owner's interest in you ended when you paid \$75.90 for the jersey.

Whereas the response of any vendor to people not buying her product is "Gee, what can I do to attract more customers," the response of sports team owners is to castigate "fair-weather fans" for being "disloyal."

To see how stupid that is, imagine a cook in a restaurant cooking food that's unpalatable, berating people for their "disloyalty" in not patronizing his restaurant.

As Ratto notes, "an empty seat doesn't mean a bad fan, it means a smart fan. It means that the team did not do enough to fill that seat." Conversely, an empty restaurant table doesn't mean a bad diner, it means a smart diner. It means that the cook did not do enough to fill that table. An unsold product does not mean a bad customer, it means a smart customer. It means that the company did not do enough to sell that product.

The Detroit Lions, to put it delicately, suck and have sucked for years. Yet such is the power of emotional identification in sports, Ratto notes, that only very recently have fans stopped attending games. "The fans have trooped out loyally for years and years and years, largely because their parents did. And what do they have to show for it? Nothing... They should have stayed away years ago."

Will it work in improving the Lions' product? It worked for the Rays. "Without their militant absence, ownership would not have changed hands, nor would the new owners have been so interested in customer service, right down to the free parking," Ratto explains, pointing out that "the fans had been given a sub-sub-standard product for so long that they had not only the right but the obligation to make the owners crawl for their love a bit. The message? You have to earn our money."

To their credit, Rays ownership decided to earn their fans' money, and as a result of those efforts made the World Series this year. Anybody in retail understands the Rays' ownership mentality and the reason for their actions. They would agree with Ratto's observation that the sellout "should not be the fans' responsibility but ownership's... the idea of customer service does not mean that the customer serves. The team is responsible for the level of entertainment it provides, and smart teams do that regardless of the level of support." **CIS**





## Needs-Meeting CRM

If you own or are with a small/mid-sized business (SMB) you acutely feel the need with the current economic malaise to even more closely manage your sales and marketing efforts and your customer relationships than in the past to obtain maximum revenue at least cost. You then may feel the need to buy: customer relationship management (CRM) software to ward off the financial chills.

In theory this approach makes sense. CRM applications can help SMBs as they offer an increasing array of features such as customer and marketing management, sales force automation, and the ability to tap business sites and social networks. Many CRM solutions integrate with enterprise resource planning (ERP), such for accounting, enable seamless data and functionality links with and for wireless devices, and they can provide essential tools like e-mail and calendar management within the applications for ease of access.

The CRM solutions are available as software licenses and as hosted software-as-a-service (SaaS). Prices range from \$125 per month per user for SaaS to thousands of dollars per licenses, plus IT integration costs for both delivery methods. Implementation timeframes vary from hours or a few days to months depending on the complexity of the solution and your IT system.

Before you rush out and purchase a CRM solution you need to figure out your specific needs, including budget and timeframe. Those requirements are based on figuring out and deciding your customer strategy: how to attract and retain buyers in varying conditions from downturns to upswings, recommends Paul Greenberg, Chief Customer Officer of BPT Partners and author of CRM at the Speed of Light. The strategy should cover the types of transaction and pricing you want to have, the level of engagement you want with customers, and the media that you will use to communicate with customers based on their communications preferences with your firm.

"Customer strategy is all what CRM really is, and then you apply systems and tools to make that strategy succeed," explains Greenberg. "Your requirements rather than the technology should be the driving factor in buying CRM tools. For that's all what these solutions are, tools that when picked to perform the right tasks can make your business processes more effective, and interactions with customers more successful and beneficial to both parties."

David van Toor, senior vice president and general manager, Sage CRM Solutions North America says SMBs are often tempted to skip the needs and technology discovery and scoping stages, which costs them if they implement the wrong tool, or one they soon outgrow.

Sage has two CRM solutions for SMBs, Sage CRM and Sage SalesLogix. Sage CRM is a Web-architected system that can be implemented on-premises or can be hosted. It features turnkey integration with Sage ERP applications, such as the Sage Accpac accounting line. Sage SalesLogix, available only on-premises, Web 2.0 list building capabilities, works well with mobile CRM applications, and handles heavier-duty ERP applications such as Sage MAS ERP.

"Take the time to research your organization's business requirements, define what CRM can do to help automate and augment them, and then scope out an ideal CRM system," van Toor recommends. "That way, you will get one that will work in a way that your business and your employees want them to work."



### More and versatile solutions

There is a wide and growing range of CRM solutions aimed at enabling SMB customer strategies. For example Vantage Communications new vPlatform™ CRM provides customer retention and revenue and sales force automation enhancement tools, marketing campaign ROI analysis, analytics and reporting, and business intelligence functionality.

Many CRM solutions continue to evolve with new features. Microsoft has enhanced its hosted Microsoft Dynamics CRM Online with the ability to create, monitor and optimize Internet marketing campaigns. Users can capture sales leads from the Web, launch and manage search engine campaigns, and perform keyword research and bidding. They can also analyze marketing ROI via click-through and conversion rate, and unify search engine intelligence with CRM analytics to optimize campaign performance.

There is increased availability of SMB-targeted CRM solutions via well-known and ultrareliable resellers. HP's extensive network of value-added resellers now offer NetSuite's comprehensive integrated business management suite that includes not only CRM but ERP and e-commerce applications.

There are new and enhanced mobile CRM applications rightsized for SMBs that enables you and your team to respond immediately and effectively to customers and prospects wherever you are. That avoids time-consuming, money (and fuel) wasting, and sales-losing trips back to the office.



Maximizer Software's Maximizer CRM 10.5 provides realtime customer service case management through wireless web access. Users have real-time online access to the corporate CRM system to dig deeper into specific accounts or expand searches via the web browser integrated with the mobile application on the device. They can quickly obtain offline subsets of customer information stored on their smartphones, synchronized back to the main CRM system.

### SMB-aimed business and social networking solutions

The keys to CRM is knowing your customers well; the more you find out about them the higher your chances of acquiring and keeping them at a profit by offering and delivering right-sized service that meets their needs. That means tapping online business information sources and social networks to obtain that knowledge.

Sugar's new Sugar CRM 5.2, appends additional information about customers and prospects by drawing from business web presences such as Hoovers and InsideView and by hovering over social networking sites such as LinkedIn and other networks. Firms can use this data to get introductions and structure conversations around this kind of relationships so that you're not calling cold. These make even the smallest sales organizations as information-rich and powerful as the largest ones.

"We realized that even small businesses sell the same way as large businesses do," explains Martin Schneider, Director, Product Marketing, Sugar CRM. "It is about discovering relationships and about having as much information about customers as possible before you make the first sales call."

This knowledge gathering includes enabling sales team members to beehive: sharing information within your company's work social networks that together will help find and generate more, and more profitable customers.

Oracle's Oracle On Demand Release 15 features collaboration or 'internal social

networking' driven by the combination of Sticky Notes and a Message Center. They allow back-and-forth commentary that is up-to-date, consolidated, centralized, and easily accessible and viewable through a home page, without having to navigate to specific records. For example, pertinent team members can subscribe to sticky notes, creating a social network that is associated with an opportunity where all members of the network are kept up to date simultaneously.

### Keeping It Simple, and Familiar

Many of these solutions have been fine-tuned to meet specific SMB needs, including ease of use and low costs. Peter Marston, an analyst with Forrester Research points as one example to Zoho, which provides drastically simplified functionality for business to consumer interactions and pricing to match. Paul Greenberg points to Really Simple Solutions as one such CRM solution he likes for the small business. It offers a comprehensive set of sales, customer service, and marketing support tools that are simple to use and affordably and easily priced, based per user and per module. You can turn on and turn off whatever functionality you need. Pricing is uniform regardless of users: you get more modules for the same money the more users you have.

"A lot of these CRM vendors are small companies themselves so they tend to know what they need, so in that regard they learn from themselves," says Greenberg.

Ease of use can also include appearance and manipulation that are similar to other and more familiar applications. Pivotal CRM 6.0, from CDC Software, provides users with out-of-the box, task-based navigation, forms and portals that have the look and feel of Microsoft applications and can model complex workflow thanks to being built on Microsoft's .NET platform. Pivotal 6.0 is integrated with Microsoft Outlook including calendaring, task and e-mail within the platform, enabling you to handle these tasks while without having to exit the CRM system.

Similarly, Salesforce.com has integrated productivity and collaboration tools such as Google apps, which gives companies e-mail, calendar, word processing, spreadsheets, presentations, website development, instant messaging, and even video production right from salesforce.com. With this, SMBs have a hosted one-stop shop for these key and integrated applications they need to run their business.

"SMBs have a lot to do and their staff typically wears many hats on a given day," explains Sean Whiteley, co-founder of startup Kieden, acquired by Salesforce.com in 2006 and who is Salesforce.com's Senior Director of Applications. "They don't necessarily have a person they can put on every project. It's great when you can go to one place for all of your needs, giving you more time to focus on running your business, and less time dealing with infrastructure and software."

### CRM Solutions Delivery Options

There are two key CRM software delivery choices: premises or SaaS. Premise-based solutions are more expensive up front yet they allow for more features, and customizations. Also the software licenses are yours. SaaS provides hosted, integrated, and readily connected applications at a lower initial price and IT costs than the alternative of buying and installing premise-based software. It is also easier, though still not easy, to cancel a SaaS solution and switch to other vendors as compared with removing old and installing and integrating with new software.

BPT Partners' Greenberg says on balance and for most applications SaaS is usually a better option for SMBs. The exceptions tend to be for where firms are handling sensitive personal, business, and government data. With SaaS the data is being handled in the cloud, and that may cause concern by these customers that the information could be intercepted.

"Every case is individual so businesses have to evaluate their choices carefully but typically a small business is better off with SaaS," says Greenberg.



Natalie Petouhoff, senior analyst, Forrester Research points out that even with flexibility of SaaS you still need to do your homework on your suppliers before deciding on them, and not take the decisions to drop your vendor lightly. Even with SaaS applications there is plenty of client-side work entailed in moving from one to another including data handling and staff training.

"The reality is that once you go down the path of SaaS-enabled CRM, are you really going to cancel?" she asks.

Regardless of delivery method, be prepared to spend time and resources on integrating especially the more complex CRM solutions with your existing system, especially your database software.

While CRM software has improved over the years in ease of installation and use, it is still one of the most complex solutions an organization can invest in.

New methods, such as open-source software (see article this issue) and SaaS can make integration easier, says Forrester's Marston. Yet organizations usually need for their existing tools to be service-oriented architecture (SOA)-based to benefit. SOA allows different applications to exchange information with each other.

If integration is a serious concern, look for CRM applications that can easily mesh with your applications. Similar technology stacks integrate easier than disparate ones, Marston points out. For example CDC's Pivotal is built on .Net, so it integrates well with Microsoft SQL databases and applications. Integrating it to SAP can be done, but that will require more work.

"To wring maximum value out of your CRM solution: from implementation to ongoing use you need to be fully committed to it and to make it happen, including organizational alignment with it, along with planning, leadership, staff training, and communication," recommends Marston. **CIS**

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

**CDC Software (Pivotal)**  
[www.cdcssoftware.com/en/PivotalCRM](http://www.cdcssoftware.com/en/PivotalCRM)

**Fonality**  
[www.fonality.com](http://www.fonality.com)

**Maximizer**  
[www.maximizer.com](http://www.maximizer.com)

**Microsoft**  
[www.microsoft.com](http://www.microsoft.com)

**Netsuite**  
[www.netsuite.com](http://www.netsuite.com)

**Oracle**  
[www.oracle.com](http://www.oracle.com)

**Really Simple Systems**  
[www.reallysimplesystems.com](http://www.reallysimplesystems.com)

**Sage Software**  
[www.sagenorthamerica.com](http://www.sagenorthamerica.com)

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

**Vantage Communications**  
[www.vantageip.com](http://www.vantageip.com)

**Zoho CRM**  
<http://crm.zoho.com/crm>

## Connecting the CRM and Voice

When you log into your CRM system you will typically get information at your fingertips on the e-mails, IMs, texts, web responses, even chat sessions conducted and received by your staff. You can also determine how quickly your agents and salespeople are responding to leads and inquiries, read the content of these interactions, and track their close rates.

Yet without spending tens of thousands of dollars or more you can't find this information out from voice, even though it is still the most important interaction channel. While there have long been links to phones i.e. CTI, they do not permit the intelligence from calls to be transmitted to CRM applications.

Fonality's new PBXtra Unified Agent Edition provides offers an affordable plug-and-play solution to obtaining voice information by combining phone system, contact center, and CRM capabilities to provide a complete view of contact center operations. Unified Agent Edition is integrated with Salesforce.com's App Exchange. That permits call detail records and other telephony intelligence handled via Fonality's cloud-based routing solution piped into businesses' Salesforce.com system. Integrations with other similar CRM solutions may be offered in the future.

The voice/CRM connectivity is enabled by Fonality's telephony and Salesforce.com's CRM databases being live in the cloud. This integration is difficult to accomplish with premise-based telephony solutions, explains Fonality CEO and founder Chris Lyman, because the telephony data is locked behind a firewall and therefore cannot be elegantly made to co-operate with a remote CRM system. That is, without costly and custom integration work.

"CRM, as we know it today, is a broken promise," says Lyman. "It promises to give you a 360 degree view of your customer, but most people spend half their day talking on the phone to their customers and these interactions simply do not display in today's CRM systems. This makes it impossible to do analytics and watch your bottom line. That is a line that everybody needs to have a keen eye on it today's economy."



Altitude Software.....	39
<i>www.altitude.com</i>	
Call Center Software Community.....	3
<i>http://call-center-software.tmcnet.com</i>	
Contact Center Solutions Community.....	5
<i>http://callcenterinfo.tmcnet.com</i>	
Forwarding International Numbers Community .....	Cover 3
<i>www.tmcnet.com/fin</i>	
HD Voice Community.....	7
<i>http://hdvoice.tmcnet.com</i>	
Infocision .....	Cover 2
<i>www.infocision.com</i>	
Outbound Call Center Community.....	15
<i>http://outbound-call-center.tmcnet.com</i>	
R.L. Bencin & Associates .....	39
<i>www.rlbencin.com</i>	
Salesforce.com.....	39, Cover 4
<i>www.salesforce.com</i>	
Spectrum Corp.....	17
<i>www.specorp.com</i>	
Technology for Business .....	13
<i>www.tfbc.com</i>	
Thomas L. Cardella & Associates .....	39
<i>www.tlcassociates.com</i>	
Varolii .....	9
<i>www.varolii.com/mindthegap</i>	
Zeacom .....	11
<i>www.zeacom.com</i>	

## Professional Telesales/Customer Service Management Searches

- Search consultants to most of the top ten service agencies in the U.S. and over 50 of the Fortune 500 companies. Small companies, too.
- All custom searches using a 25,000 resume file plus extensive proactive calling.
- Dedicated telesales/customer service searches since 1981..the first and the best!

**R.L. Bencin & Associates**

2616 Hidden Canyon Dr.  
Brecksville, OH 44141  
440-526-6726

Resumes welcomed!  
E-mail: [rlbencin@netzero.net](mailto:rlbencin@netzero.net)  
Web site: [www.rlbencin.com](http://www.rlbencin.com)

## Contact Center Specialists

*Inbound | Outbound | E-mail  
Web Chat | Off Shore | At-home Agent*

**Thomas L. Cardella**  
A S S O C I A T E S

1-888-788-0333 | [www.tlcassociates.com](http://www.tlcassociates.com)



**Turn customers into evangelists.**  
[www.salesforce.com/callcenter](http://www.salesforce.com/callcenter)



**altitude**  
software

A global leader in  
delivering Contact  
Center solutions.

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

Toll free: +877-474-4499 | Local: +905-479-2655 | [callus@altitude.com](mailto:callus@altitude.com)



## To Advertise in Customer inter@ction Solutions® magazine, Please Contact:

**Karl Sundstrom**  
Senior Advertising Director —  
*Eastern, Western & International*  
(203) 852-6800 ext. 119 [ksundstrom@tmcnet.com](mailto:ksundstrom@tmcnet.com)

**Jaime Hernaez**  
*Strategic Accounts Sales Executive*  
(203) 852-6800 ext. 217 [jhernaez@tmcnet.com](mailto:jhernaez@tmcnet.com)

**Brendan B. Read,**  
SENIOR CONTRIBUTING EDITOR



## Resolutions For 2009

January is the time when many people, including the fine contributors to this publication make forecasts and predictions for the coming year. Here is a variant of another January tradition; The New Year's Resolution, with a set of them for the contact center industry.

- For telemarketers, and teleservices firms
  - Accept the inevitable: that outbound telemarketing is dying from a fatal blend of overuse and abuse that created the popular do not call (DNC) registries, the switch to wireless, SMS, e-mail, and the Web, and more cocooning, don't-bug-me, and savvy buyers
  - Reassert your role as the customer interactions innovators by anticipating and responding to leading-edge needs, such as identifying product problems before they become calls and lost sales, with superior results-obtaining expert-trained and empowered sales and service representatives
- For lawmakers and regulators
  - Avoid in the quest to gain more revenues to balance budgets and to pay for bailouts of bloated and ill-managed industries, squeezing unsubsidized direct marketers—including contact center-using catalogers and direct response firms—and telemarketers with higher fees and taxes
  - Lay off telemarketers and not scratch the itches of introducing B2B Do Not Call and offshore notification requirements. The former hurts will hurt businesses more than it helps by restricting marketing while the latter will hike costs, annoy customers by forcing them to stay on the phones longer, and drive even more calls to self-service, leading to job losses
  - Unify U.S. federal and state telemarketing laws. Get rid of the bureaucratic and costly-to-comply-with hodgepodge of state DNC registries, calling hours, and registration requirements. One country, one set of customers, one set of businesses, one set of laws. If you don't like them, contact your Congressman or U.S. Senator
- For industry suppliers
  - Make your solutions more buyer-friendly. Modularize and simplify. Enable contact center customers to mix-and-match, to add to meet needs and budgets. Utilize open source and hosted delivery to add flexibility and cut costs. Don't lard your wares with features and functionality i.e. 'bloatware' that contact centers may not need and which add to costs both directly and in IT time. Don't make the same fatal errors that U.S. carmakers have done by building and pushing only large solutions at the neglect of other more scalable offerings
  - Do address critical needs such as bridging functionality silos. Forrester Research says there needs to be tools that equally effectively enable customer interactions, aggregate and manage customers' information, and provide business process automation across departmental tasks
- For contact center decisionmakers
  - Get smart when buying solutions. Identify your needs. Do your homework. Factor into the TCOs the resources to train your people how to use and upgrade the hardware and software. There is no point in buying these tools if the staff can't use them
  - Take a closer look at speech rec and chat solutions. There are new solutions that make them more effective and affordable. While they may not have all the bells and whistles they do save money and time while retaining customers
  - Play the corporate game in getting resources. Become multi-lingual i.e. speak the language of business. Align your needs with those of other departments. Too often contact centers get less than what they are seeking or worse get tossed with an inadequate CRM or other 'chuck money at the problem' tool because they haven't adequately communicated their needs
  - Go home. Literally. There is no longer any sound reason why contact center services must be provided from corporate-subsidized facilities whose need to commute to shrinks productivity, gums up the roads, kills the air, and drives up taxes and health-care costs. Home agents continually outperform those in cube farms as well as cost less and stay longer
  - Always think of your customers, and your staff, and design your service and employee management programs accordingly. Contact centers are about people. The better you serve and treat them, the greater the chances that they will return the favors through more loyalty that leads to more revenues at less cost with greater happiness and satisfaction all round. **CIS**





# Forwarding International Numbers

Global **Online** Community

TMCnet has joined with the industry's leading provider, TollFreeForwarding.com, to educate businesses about the benefits of utilizing international toll-free and local phone numbers.

TollFreeForwarding.com provides businesses with virtual toll-free and local phone numbers in over 75 countries, and 800 cities. Calls to these numbers are forwarded to each customer's call center or office. In addition to this, TollFreeForwarding.com offers related services, such as time profiles and virtual PBX functions.

Visit the Forwarding International Numbers Community for the resources and the latest news on:

- International Virtual Numbers
- International Calling
- International Toll-Free and Local Numbers, and telecommunications
- Capturing and serving new customers in foreign countries
- Establishing a virtual presence without a local call center or office

## International Business Phone Services

**Visit Today!**  
**[www.tmcnet.com/fin](http://www.tmcnet.com/fin)**

Sponsored by:

**TOLLFREEFORWARDING.COM**

+1-213-452-1505

Powered by:







**Turn customers into evangelists.** Help agents delight customers by putting the right answers at their fingertips. No software to buy, no hardware to manage, just a complete call center you can get up and running in weeks. [www.salesforce.com/callcenter](http://www.salesforce.com/callcenter)



salesforce.com®