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Nadji Tehrani, CEO, Technology Marketing Corp.

## The Death Of The Sales Manager

To do justice to this subject matter, one must make reference to Arthur Miller's legendary play entitled, *The Death of a Salesman*. To refresh your memory, Miller won a Pulitzer Prize for his work, which he described as, the tragedy of a man who gave his life, or sold it in pursuit of the American dream. The main character in the play is Willy Loman, who, after many years on the road as a traveling salesman, realizes he has been a failure as a father and husband. His sons Happy and Biff are not successful on his terms (being well-liked). Willy's main claim to fame was to use a smile and a shoeshine as the only sales technique one needs to be successful in sales.

To say the least, Arthur Miller taught us that selling success need not be at the expense of being a failure as a father or a husband. In other words, being a great salesperson and being a great father/mother and a husband/wife does not have to be mutually exclusive. For this alone, I think he richly deserved the Pulitzer Prize, for today, far too many people are placing business success ahead of the family and being a good father/mother and a good husband/wife.

Today we have learned that Willy's legendary smile and a shoeshine selling technique is only 5 to 10 percent of selling skills. There are plenty of other things that go into selling success today, which have been addressed in previous Publishers Outlooks in this publication over the last two decades.

### The Death Of The Sales Manager

Last but not least, one needs to address this great phenomenon, which in many ways is sad, but true, therefore, it must be stated. Not long ago, I met with the Vice President of Sales of one of the largest magazine printing companies, who was soliciting our business. During the social conversation, he asked me, "Do you promote from within?" I answered, "Promotion from within is our middle name." In fact, I stated, "in 2000, nearly 70 percent of the employees at TMC were promoted." He was very impressed and stated, "Then I am sure you will enjoy the following story."

A farmer who enjoyed duck hunting had a dog that was exceptionally effective in hunting down the ducks that were shot down. The farmer, looking at the dog's perfor-

mance and personality, named the dog Salesman. Pretty soon Salesman's reputation spread through the small town where the farmer lived and the town leaders called the farmer and stated, "We understand that you have a great hunting dog and we would like to go out duck hunting with you and your dog." And so they did. Of course, Salesman impressed all of the town leaders that indeed he was extremely hard working, very talented and very motivated in performing his duties. At the end of the day, everyone was grateful to the farmer.

A week went by and the town leaders called the farmer again and asked to go out duck hunting because the last time was a fantastic event and the town leaders insisted that Salesman must come along. The farmer said, "I would be happy to go hunting with you, except that I am sorry to tell you I shot Salesman." People asked why. The farmer stated, "Well, the salesman did such a good job, I promoted him to sales manager and thereafter, all he did was sit on his ass and bark all day and got nothing done!"

There is a strong message in this story, which I think is not far from the truth in most cases. One of the most commonly made mistakes by management is to take a top producing salesperson and promote him or her to sales manager. The mistake becomes even more damaging if the salesperson has been doing well in a good economy and then promoted. The fact is, even if the salesperson was outstanding in selling during a bad economy that still does not mean that he or she would make a good manager. **CIS**

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

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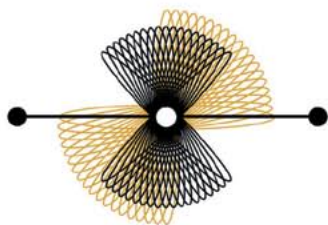
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Rich Tehrani, Group Publisher, Technology Marketing Corp.



## 15 Ways to Keep Your Job

**D**espite the trillion-plus dollars spent by two administrations, job losses in the U.S. and around the world are at record levels. Most companies are not prepared to make it through this environment.

There is one certainty in this financial mess. All companies have to produce more with less and try to keep existing customers while acquiring as many new ones as they can. To make matters worse, an atrocious financing climate means all companies need to be profitable or as close to it as possible.

Yet in this environment where there is no margin for error there are so many mistakes being made. If you keep making them, your job and those of your colleagues could be next. Here are keys to keeping your job.

**This may be dramatic but 10 percent of the workforce is unemployed. You aren't likely to get a job for a while if you are let go. Make sure you sell every customer you can and keep the existing ones as well. If you are on vacation and your top customer contacts you, explain to your spouse the situation and take the call.**

### 1. Produce more

Work harder. Work longer hours. Immerse yourself in your profession. Know what your suppliers and your competition are doing. Know everything. Become an invaluable resource to your colleagues. Become the last person the CEO could ever consider firing in their right mind.

### 2. Have a plan and evaluate and change as needed

Numerous times I have seen companies spend hundreds of thousands and even millions of dollars on marketing campaigns and at the end of them the company has no idea how to measure effectiveness. In one case I witnessed a company launch a huge branding campaign and at the end of it they wondered where the leads were: not realizing that lead generation and branding are different things.

### 3. Act like your life depends on every customer: it might

This may be dramatic but 10 percent of the workforce is unemployed. You aren't likely to get a job for a while if you are let go. Make sure you sell every customer you can and keep the existing ones as well. If you are on vacation and your top customer contacts you, explain to your spouse the situation and take the call.

### 4. Change marketing practices

It is astounding to me how out of touch companies are with their sales teams. For decades companies have focused on lead generation activities from shows to webinars, and in most cases companies haven't a clue if the leads they generated were followed up on. The disconnect between management, marketing, and sales is staggering. Remind yourself that your job in life is to sell your products. If you haven't figured it out by now, make it easy for your company and resign now.

### 5. Understand when lead generation is a waste of money

How many companies which occupy the lowest tier of a market are spending only on lead generation activities? One company I know competes with [Cisco](#) and has an unrecognizable name in the market. They are focusing exclusively on generating leads. Most of these generated leads won't close because in this economic environment customers need reassurance that smaller companies will be in business going forward. It makes you wonder who is in charge of many organizations and when it became acceptable to not worry about your corporate brand and image.

### 6. Your customers aren't criminals

This is a tough one but all companies are facing debt collection issues. When you do, walk the fine line of being respectful while firm. Sure, some of your customers are going to stiff you but be careful not to alienate the companies who will quadruple their spending in the years to come.

### 7. Change your culture

If you are a company where employees leave at 5:00 PM and don't sign onto their computers and work at night,





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you need to make changes. This may not apply to the numerous companies funded by taxpayer dollars (TARP, etc.) but for the rest, you need to produce more with less and getting more work done is the answer. Be prepared to let people who don't work hard go after a few warnings. You are doing their coworkers and yourself a favor. Over time, let go of more and more weak producers. If people can't step up production in this financial environment they have themselves to blame.

#### 8. Look for silver linings

This is a tough economy yes but learn from your mistakes. Companies which survive this downturn are going to be the leaders of the next decade.

**It is too easy to say the economy is tough and to put your collective heads in the sand until things get better. There are two reasons not to do this. The first is a wasted opportunity. Now is the time to find ways to produce more. Work harder. Work smarter. Now is the time to say that when the going got tough you found a way to make it through and actually increased sales and/or profits.**

#### 9. Don't give up on customers

You know what? Customers are spending less but spending hasn't ceased. Ask [Apple](#) or McDonald's. Position your products to match the needs of your customers. Having trouble making IP PBX sales? The simple solution is to bundle a SIP trunking solution along with the IP [PBX](#) and show the ROI of the combined solution.

#### 10. Explore social media but have a goal

The amount of companies which are spending valuable resources updating twitter feeds that no one follows is staggering. Let me understand — you lay off 25 percent of the workforce — and the sole marketing person spends an hour a day updating a Twitter account with 30 followers? How does this work out financially? Don't do what everyone else does — do things which generate revenue — things which have a purpose and things which reinforce strategy.

#### 11. Experiment with new ideas

There are more efficient ways of doing virtually all things. Minimize risk while attacking new markets/segments.

#### 12. Communicate internally

Your employees are likely scared. You may not be able to guarantee their job security but you better have a plan for getting through this mess. Articulate it at least quarterly. Make sure you are responsive and understand and respond to employee concerns.

#### 13. Communicate externally

Would you buy from a company that has ceased marketing and PR? I wouldn't. Ok, I might buy candy or gum from such a company but security software? A firewall? Data center products? I don't think so. If you think the best response to global uncertainty is to become mute you are certainly doomed. Please stop reading here and update your resume.

#### 14. Don't do stupid things

A few companies have stepped up e-mail in these times as it is a low cost way to get the message out. I have seen some companies go from no messages to one message a day and it is often the same message. This sort of behavior will definitely get the companies in question added to spam lists which guarantee all subsequent e-mails will not be seen by anyone.

#### 15. Have a web strategy: it could be your most important one

It is 2009 — the web is about 15 years old and some companies still admit they don't have a web strategy. What exactly are you waiting for — a web stimulus program? Scary stuff.

It is too easy to say the economy is tough and to put your collective heads in the sand until things get better. There are two reasons not to do this. The first is a wasted opportunity. Now is the time to find ways to produce more. Work harder. Work smarter. Now is the time to say that when the going got tough you found a way to make it through and actually increased sales and/or profits. When you retire you will not forget what you accomplished.

Sadly the second reason is because we don't know when we will go back to the old normal. What if the economy stays slow for the next five years? Do you really think you will be around with no PR and marketing for half a decade? Are you working on a plan to get new customers in today's economy or waiting for things to turn before you try harder?

I realize times are the most difficult they have been in our lifetimes but regardless of who you are, you can do better. You can be a winner. When you cross that finish line and look back at what you were able to accomplish in this terrible market, I promise you will have trouble wiping away your smile. **CIS**





## Call Center Software Online Community

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

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Keith Dawson, Senior Analyst, Frost & Sullivan



## Aren't Centers Already Unifying Communications?

Several major vendors have developed significant product offerings for the contact center that hinge on bringing unified communications (UC) applications into that orbit. Yet contact center professionals have not yet come to fully understand the power and value of UC technologies. The key reason is that contact centers have always used UC but in component parts: presence, point-to-point calling, chat, IM, audioconferencing, and unified messaging in a tightly controlled environment, unlike other departments and functions.

Given that fractured functionality, UC is best understood as a framework for better technology management, not just as a single product, and especially not as a technology grab bag.

Unified communications allows a company to build a structure for integrating its people together through the adoption of presence and availability-awareness tools. These tools meld each individual's capability for communication with the availability to communicate and the specific knowledge that person holds. It's brilliant, the way UC breaks down silos around people the same way business intelligence tools break down silos around information.

This has the direct result of improving First Call Resolution. It eliminates the step where an agent has to beg off solving a problem and promises a callback by someone who has more knowledge or authority. More calls are completed on the first go, which directly affects metrics like FCR, customer satisfaction, and ultimately is reflected in the bottom line.

UC also consolidates contact center communications functions into coordinated, often standards-based platforms. That promises easier deployment and upgrading and less costly management of the core systems. IT and telecom support groups can better manage tools when they are integrated than when they are added to an organization piecemeal. This lends itself to better propagation of systems, information and best practices throughout the company. The contact center, as the main operational engine of telecom, benefits first and most.

Yet for contact centers UC must go beyond their typical ad hoc use at the agent level. There is de facto demand from customers that organizations use UC to link into mobile access and social networks to communicate with them on their terms. Even customers who are "satisfied" use quasi-UC tools like Facebook and text messaging to insist on a different kind of relationship. They can gather more information faster and deploy it better at the time of the contact than your agents.

What this means is that contact centers are in an arms race with their customers to deploy multifaceted communications tools quickly at the agent level.

To keep up with the changing customer base, the contact center needs to leverage more diverse sources of information to paint for the organization a much richer picture of the customer's intentions and needs. Fortunately, the contact center is usually sitting on a massive storehouse of data which is not as widely used as it should be: call data, customer data, and recorded calls themselves. A company may not have as much power to control the customer interaction, but it has a lot more information available to shape and influence it.

Moving that information into a position where it can be used by the right person at the right time is exactly what unified communications is designed to do.

As Generation Y and the Millennials age into the workforce more contact center reps will expect to have UC tools at their disposal. If a company doesn't provide them with the tools they think they need, individual workers will deploy them nonetheless.

It's important to remember that contact centers have been pioneering "UC" in different forms for more than twenty years. Every time an agent starts his shift and signs into an ACD, he is establishing "presence" that tells his supervisor and co-workers exactly what his "state" is. His availability, skill set, preferences and performance are all communicated in real time to people who need that information. That is the essence of unified communications.

The contact center is the most finely tuned engine of high-productivity communications ever created. Contact centers are expert at unifying communications; now that enterprises are interested in learning how to do it, why shouldn't the contact center lead the way? **CIS**



## Convergys

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

**Convergys** has announced the availability of a platform-independent On-Demand Voice Authentication product, which Convergys clients and non-Convergys clients can implement by enrolling the voice signatures of their customers and employees.

Included in this product is voice biometric security from the Voice Signature Service provided through Convergys' partnership with TradeHarbor. The idea is that upon enrollment, companies can authenticate agent-assisted and consumer transactions more securely than with a traditional ID + PIN authentication.

Convergys officials describe it as a "no-capital expense deployment," touting its pay-as-you-go model. A person's voice signature is as unique as a fingerprint and can be used in legally binding documents and contracts if allowed by applicable law.

"Today's voice authentication is a competitive differentiator because it is new. However, with the increase in online transaction activity and increase in mobile device use, voice authentication will quickly go from being a nice-to-have to being a must-have for companies that want to retain their customers," says Bill Livingston, vice president of services architecture and deployment, TradeHarbor.

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

## Can UC Save You Real Dollars?

In his On Rad's Radar, Peter Radizeski of RAD-INFO, Inc writes:

We hear a lot about Unified Communications today. UC this and UC that. Even Cloud Telephony and UCaaS.

The main buzz is around the savings from UC. If you have a distributed workforce, then unifying on a communications platform with a collaboration module can improve productivity.

The productivity gains only come if the technology is easy to use, reliable, and intuitive. By intuitive, I mean that unlike some CRM and telco software platforms, the software was created with the user in mind and doesn't require a lot of thinking on how to do something. It needs to be like WYSIWYG.

Anything done by committee means it will be drawn out and frustrating. The current collaboration software I have seen are really just document sharing applications and some white boarding online.

UC's benefits come from a geographically dispersed workforce or a virtual office setting. It's similar with VoIP. If you are making a lot of in-state calls to other branches, the cost savings from VoIP diminish. When people are working on the same project but aren't in the same building or city, making progress is tricking because audio conference calls, IM/chat and email are one-dimensional. Video conferencing, webinars, document sharing, and whiteboarding - all can lead to productive gains.

It looks like a lot of the UC hype is based on productivity gains and time savings, not so much real actual dollars. **Aspect** rolled out Microsoft OCS globally and is seeing over \$1 million in real savings. So there are real dollar benefits to UC if it is rolled out correctly with proper training.

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

## Don't Cut Customer Outreach in a Recession

In his Communications and Technology Blog, Rich Tehrani writes:

It is fascinating to hear industry execs speak of how most of their customers are cutting back on their spending so in response they reduce their spending on new customer acquisition by cutting PR, marketing and sales budgets.

For those companies who are able, now is the time to keep the above budgets steady or even increase them. Marketing today has evolved light years from where it was in the past. You can now track page views, clicks, browsing behavior and response to various creative graphics and messaging. In short, you can determine how to spend outreach dollars more effectively today than ever before.

And most companies don't realize this. They sadly have top level managers who indiscriminately cut customer outreach dollars because that made sense to them in the past when measurement techniques were in the stone ages.

What needs to be factored into the equation is the fact that customer outreach has evolved and disciplines like SEO, SEM, social networking, PR, live and web events need to be continued - in order to get more customers.

Sometimes a change in messaging is needed as well. For example, the hair dye company Just For Men is now running ads on TV which imply their product can help candidates on job interviews. **Genius**. By definition, many will infer the product can help them keep their job as well.

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



- **Five Nine ([www.fivenine.com](http://www.fivenine.com))** has released Virtual Call Center Suite 7.2 that adds preview dialing to the hosted/SaaS solution, which has predictive dialing, thereby giving collection, customer care, sales organizations choices in what tools to reach out to prospects and customers with. The Five Nine software also has data import, call scripting, campaign/list management, do not call list compliance, quality monitoring, and realtime and historical reporting. It can also be used by home-based agents.

- **GMT ([www.gmt.com](http://www.gmt.com))** has a new version of its GMT Planet workforce optimization suite, the Lanier edition, which includes several major enhancements and new capabilities. It has an enhanced forecasting engine that enables users to review and analyze historical workload demand data. It also permits the system to automatically identify the best forecasting methods and parameters to create the best-fit forecast. These tools enhance the ability to match supply and demand. It permits improved cross-utilization across skilled positions and offers new displays showing service levels for skilled positions and enhancements to calculating and managing shrinkage and shortages in those roles.

The Lanier edition now offers absolute and cascading task priorities, which allow the user to define the order in which work must be completed. Schedules are created significantly faster through improved multi-threading. GMT QualityLink provides an open-systems framework to integrate GMT Planet with commercially available call recording and quality monitoring solutions.

- **Enterprise Software Solutions ([www.enterprisesuite.com](http://www.enterprisesuite.com))** has launched a software as a service (SaaS) version of its Enterprise Suite ERP/CRM/e-commerce solution. The SaaS program, branded as Enterprise On-Demand, combines the increase in productivity of the Enterprise Suite together with the lower upfront costs of a monthly subscription SaaS service. Enterprise Suite uses smart client technology, which combines the best of a desktop application with the best of a browser-based application, users can experience the same “no compromise” user experience, whether over their internal network or over the Internet.

- **Noble Systems Corporation ([www.noblesys.com](http://www.noblesys.com))** has introduces Outbound WFM module for Noble® Workforce Management. It has several features and tools targeted for outbound and blended outbound/inbound environments. It has outbound forecasting for agents, to schedule agents based upon records to call and outbound forecasting for calling lists to determine the resources needed to exhaust a list quickly or to spread calls evenly across a time period. It

also has inbound forecasting to predict call volumes, including predicting “Valley” periods when inbound volumes are low so that outbound campaigns can be scheduled, and what-if scenarios explore the affects of volume and service level changes. There is data sharing with the Noble® Solution for outbound and inbound statistics.

- **Salesforce.com's ([www.salesforce.com](http://www.salesforce.com))** new Summer '09, the company's 29th generation release of its famed hosted CRM solution, has several new features. New to the Service Cloud are real time partner collaboration, case workflow optimization, and online community management tools. The Sales Cloud has been upgraded to permit visual charting, triggered E-mails, and deal team management (which gives sales reps brought in to assist in closing a deal have access to the deal information). Summer '09 makes it even easier to build and run custom applications on Force.com. New features will include workflow visualizer, Visualforce for dashboards, and advanced application tracking.

- **SPSS ([www.spss.com](http://www.spss.com))** has introduced PASW Data Collection 5.6 (formerly Dimensions), the latest version of its feedback management and survey research software. PASW Data Collection 5.6 introduces new data entry capabilities, an enhanced authoring interface, and new phone-based interviewing capabilities. This release also further extends the enterprise readiness of the data collection platform with enhancements to performance and security.

- **Syntellect ([www.syntellect.com](http://www.syntellect.com))** 's latest release, Syntellect Customer Interaction Management (CIM) version 7.0 includes more than two dozen new product enhancements, including a redesigned graphical user interface, agent application enhancements to improve efficiency and effectiveness, interaction management lifecycle reporting enhancements, and outbound application integration. The CIM 7.0 release is optimized for Syntellect's upcoming Outbound Communicator solution, to be released in September 2009, for blended or dedicated agent proactive outbound customer campaigns. Outbound Communicator carefully monitors agent availability and has automatic throttle control for call pacing. Combined with CIM, Outbound Communicator allows for predictive and progressive dialing to send calls based on agents skills and availability.

- **Verint ([www.verint.com](http://www.verint.com))** has come out with the new Impact 360® Speech Analytics solutions aimed at bringing speech analytics technology into mainstream contact center operations without costly setup overhead, lengthy consulting engagements and the need for interpretation





by separate analyst staff. Impact 360 Speech Analytics enables businesses to mine recorded customer interactions. It proactively identifies call drivers—along with the related product, process and service issues that often originate in areas outside the contact center such as back-office functions—plus emerging trends, opportunities and competitive influences.

Key, patent-pending functionality featured in Impact 360 Speech Analytics Essentials, as well as Verint's Impact 360 Advanced Speech Analytics solution, is driven by the company's proprietary Complete Semantic Index™ technology. It features such functionality as: automated trend analysis, guided search and context visualization, and analytics-driven unification with Verint's workforce optimization suite via native integrations. It also features Automated Root Cause Analysis with patent-pending TellMeWhy functionality.

- **Zultys** ([www.zultys.com](http://www.zultys.com)) new Version 5.0 software for the MX250 and MX30 Enterprise Media eXchange iP PBX products has several key new features. MXconnect can make any phone number e.g. home or mobile an office extension, which supports home-based agents and field service personnel and subject matter experts. The enterprise-wide presence and IM features of MXIE™ have

been expanded to allow users to type a short note that provides additional status information that is displayed to all other users, such as 'back at 2pm' or 'In training all day'.

Version 5.0 allows users to dial from any desktop or web-based application. It permits systems administrator to define and construct pop-up notepads or drop-down menus that are displayed upon making or receiving calls. Specific and customizable information such as notes, wrap-up codes and account codes can be added. This data is transferred with the calls to other agents as the calls are processed. When the calls are completed, the call attached data is added to the call log and is easily retrievable. There is call recording from any type of phone and unlimited call detail record archiving in an external MySQL Database.

Zultys' network and phone systems now has session border controller and port mapping that provides improved security. Organizations may deploy the MX system behind corporate firewalls while allowing home and mobile employees to securely connect into and operate with it. An advanced near-end and far-end NAT Traversal feature set negates the need for Virtual Private Network (VPN) connections. There is also ZIP 5-series silent monitoring for supervisions and realtime SIP call monitor/packet capture for troubleshooting and network monitoring. **CIS**



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# Videoconferencing (Finally) Gets Here

**V**ideoconferencing, which has long been a 'tomorrow technology' i.e. much promise, many benefits, but difficult and costly to execute, may finally be here thanks to a perfect blend of increasingly value-rich, practical, and affordable solutions. These range from high-end telepresence systems designed in interiors, furniture, and layout to make the linked offices seem as expansions of their own, conventional and popular high definition room-based systems, and to desktop units such as agents' homes. The clarity, resolution, the flow of action across the screens, as well as the audio with today's videoconferencing products is remarkably natural; it is like being there.



That is a welcome development for contact centers looking to cut costs and hike productivity by reducing travel such for internal and client meetings and for training. It is also good news for those that want home agents programs but which require high touch with staff; video provides richer connections than voice or data communications alone between remote personnel and their colleagues and supervisors.

Melanie Turek, Principal Analyst, Enterprise Communications, Frost & Sullivan, expects that the worldwide videoconferencing endpoints market will reach \$1.31 billion in 2008, a jump of 14.6 percent over 2007. Global revenues for the video conferencing infrastructure systems market reached \$342.5 million in 2008, a robust 18.2 percent increase over the previous year, and are expected to reach \$832.6 million by 2014. These numbers exclude the telepresence market; it expects growth there, too.

"There has been a spike in videoconferencing interest every time travel becomes expensive or unpopular such as with the fuel price spikes and following the 9-11-01 terrorist attacks," says Turek. "Yet in the past the inquiries and demand have come down because the technology has proven unworkable. This time is different because the technology has caught up to the hype. Videoconferencing tools can do what the vendors say they can do and that's great news for the users."

## Technology and ROI

Turek cites greatly improved hardware and transmission technology as a key driver behind video interaction usage. She points to high-definition videoconferencing that provides superb sound and video quality on even the smallest screens. Codecs, which encode and often compresses video and sound data streams and decodes and decompresses them for playing or storage, have become more robust and reliable. Gateways and multipoint controller units provide secure access through corporate firewalls. Conferencing tools, the exception being telepresence, no longer require separate IT staff to launch them.

Also, suppliers have been migrating to open standards to permit interoperability between different units. These increasingly run on IP networks managed by existing IT staff compared with older, slower, and much more expensive ISDN that required a separate telecom person.

These developments are being reflected in the prices. **Polycom** reports that a high res/DVD-quality conference room system now has street price of \$4,000 whereas they used to run for \$15,000 to \$40,000. **Tandberg's** E-20 IP-enabled videophone offers HD quality video at the desktop HD at \$1,500 whereas previous similar solutions cost \$5,000 or more.

**Gartner** analyst Robert Mason has seen entry level IP endpoint pricing declining. Also the per-minute pricing of conferencing have dropped from \$60/hour to \$30/hour per participant as firms negotiate better deals with the carriers.

Rapid expansion of high-bandwidth residential broadband networks have finally made video to the home agents feasible for contact centers whose management and clients need to see their employees, and for them to interact visually. DVD-quality video requires 768 kbps in both directions, which is not out of the question when some home connections are 1.5 mbps or more.

All told, the improved functionality, lowered costs, and ease of use have boosted acceptance of and the ROI of videoconferencing. That has led to increased likelihood of getting approval for these tools.

"Most of our clients tell us that our technology pays for itself in under a year, sometimes six to nine months," says Rick Snyder, President, Americas, Tandberg.

Videoconferencing has its greatest value for the high value workers: consultants, subject matter experts, and senior management where the loss of productivity caused by being in transit hits the most. Consultants lose money in travel, and make up for it in higher rates.





"While these individuals now have smartphones that make them a little more productive than they have been in the past, even so our clients are telling us that there is still wasted time and output in travel," explains Polycom Video Solutions Group Vice President of Marketing Joan Vandermate. "As smart as these phones are they are they can't enable them to be as effective as they are on the ground and in their offices."

### Videoconferencing challenges and solutions

There continues to be several but surmountable challenges with videoconferencing. The biggest one is its popularity and success; as more staff want to use the technology that will require more rooms, tools, and bandwidth.

Alternatively there is interest in having videoconferencing at employees' desktops. Yet it lacks the rich look and feel of room based systems, say analysts, and are best used for internal communications, such as with home-based agents.

While desktop and room-based videoconference systems are interoperable, some telepresence systems may not be as they may use different codec technology to optimize performance. That could prevent offices from using telepresence if they have products from separate suppliers.

This issue is beginning to go away. Cisco TelePresence meetings can now include video from any standards-based high-definition or standard-definition videoconferencing, web-based e.g. Cisco WebEx, and other desktop applications like Microsoft Office Communicator.

"With telepresence you are trading off the private networks and sometimes proprietary technology to have a high quality call that you can control," explains Mason. "Those customers get great deal of value for this. And over time the interoperability will improve." **CIS**

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

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

**Citrix**  
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### Webconferencing

Webconferencing; with data, audio, and video streaming, which has long been popular for internal meetings and presentations, is now becoming a travel substitute like videoconferencing for several specialized applications. These include training both internally and by clients and outside professionals. Web conferencing can also help workgroups collaborate on documents and products virtually, because they allow applications sharing, markup and even links to asynchronous team-rooms, says Melanie Turek, Principal Analyst, Enterprise Communications, Frost and Sullivan.

These solutions are continually being updated. Citrix is now using Global IP Solutions (GIPS) integrated VoIP and PSTN audio conferencing in its GoToMeeting and GoToWebinar offerings. GIPS software handles all aspects of audio mixing and processing for conferences or collaborations. That includes typical issues on IP networks, such as delay, jitter, packet loss, background noise and echo; thereby ensuring excellent audio quality, even under adverse network conditions.

"With current economic conditions, there's an increasing demand for unified communications and collaboration capabilities, which help to offset travel expenses," said Global IP Solutions' CEO Emerick Woods. "Citrix offers the easiest user-friendly one-click meeting service on the market to satisfy this growing demand.

**InterCall** Unified Meeting now has a 'click to start feature that enables faster, simpler, and more straightforward collaboration. It can automatically dial participants in when the hosts starts the meeting, which means no more looking up dial-in numbers or logins. Hosts can control the phone portion of the meeting using the web, which avoids the hassle of extensive telephone keypad commands. Attendees can quickly join or start online meetings with a simple click on the InterCall desktop icon in their task bars. Also sales professionals can host product demonstrations without requiring their customers and prospects to download software.

While web conferencing lacks the virtual face to face interaction of

videoconferencing, Ross Daniels, Director, Unified Communications Solutions Marketing, Cisco Systems says it has the advantage, for today at least, of ubiquity compared to video. While video--from desktop video to immersive video such as telepresence--is becoming more common--web conferencing today is easy to access and easy to extend to subject matter experts in any location where there is online access.

Cisco Systems has seen significant growth of its Webex solution: 45 percent year over year. Much of that demand has come from clients who want an alternative to travel. He reports that training travel has been reduced drastically.

"You can deliver even better training with web conferencing compared with in-person meetings because you can get the participants engaged because they can see the presentations and ask questions at the same time," explains Daniels. "Web conferencing can also accommodate multiple presenters in several sites."

## Short Message Service (SMS)

**D**o you remember when accepting emails from customers changed call centers into contact centers? Way back in the dark ages of technology, about 1996. Since then it seems like contact centers, and enterprises in general, have been forced to accept new avenues for customer interactions on a consistent basis, with varying degrees of success.



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

While voice is still the dominate player for interactions, more and more text-based technologies are gaining ground. Contact centers and enterprises alike have started to use these media, both for customer interactions and to provide valuable tools for their work force. Short Message Service, or SMS, is one tool that's become more common in organizations of all kinds, for customers as well as employees.

Until recently and primarily in contact centers, SMS was treated as an extension of email, to give agents a way to interact with customers who wanted to use SMS. However, there were several barriers to truly incorporating SMS into the corporate infrastructure, with proprietary networks, modems and agreements with SMS brokers posing most of the hurdles.

As a result, sending an email to a cell phone number, and letting the providers deliver it as an SMS message to the customer, was standard practice. But while customers might have been satisfied, contact centers weren't realizing the full benefit of this other media type. Especially now with the explosion of mobile devices and remote worker applications, the need for organizations to revisit SMS outside of the contact center is even more important.

Today, plugging in SMS to the corporate network is becoming easier. Gone are the modems in the telecom rooms, and in their place are standard TCP/IP connections to the SMS brokers. Gone are the proprietary tools to build interfaces between SMS and other applications, replaced by standards such as SOAP, HTML and others already used elsewhere in the organization. Also gone are email front-ends pretending to be SMS interfaces. In their place are desktop clients purposely built for SMS-based conversations.

For the contact center, the benefits of doing SMS the right way are easy to recognize. As its own separate media type, the same metrics applied to voice, email, fax, and other interaction types can now be applied to SMS. Messages can be dropped into an ACD queue right beside phone calls and emails. Reporting can separate SMS from other interaction types. Supervisors can even monitor and track how their agents manage SMS conversations, just as they would other media types.

Moreover, outbound contact centers are increasingly treating SMS as a separate outbound touch point to their customers, applying the same rules they would to an automatic outbound

to provide the customer a way to speak to an agent during an outbound phone call, the same capability can be handled with outbound SMS messages. How? Remember, SMS is just another media type in the contact center at this point, and therefore as an inbound reply, can be routed based on skills or customer data to the correct agent, just like a phone call.

Also, many organizations are seeing the value in SMS outside of their contact center. With the mobile workforce growing daily, and with a wide variety of mobile devices in the hands of mobile workers, SMS applications can be a common interface into the corporate network.

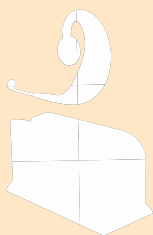
Once thought of as a social tool for the younger generation, how many of you reading this have sat in the back of a meeting room, unable to talk on your cell phone, all the while carrying on a text conversation with a colleague? Now what if you could use SMS for more than just a conversation?

Send a simple SMS into your network with items such as "FP 555-1212", "SS Gone Home", "CS Bill Smith". At first glance those might seem a bit cryptic, but in one organization if an employee sent the above SMS messages, three things happen: their office phone is forwarded to '555-1212', their presence status in the corporate directory has been set to 'Gone Home', and a return SMS message was sent to their phone displaying the 'Current Status for Bill Smith'. All of that without ever calling into an IVR, or even having any special software loaded on their mobile device. Sending a single SMS message did the trick.

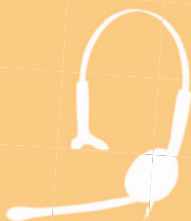
Before you dismiss SMS as just a quick way to send a message, look around your organization for other ways to use a technology that already exists for your employees and customers. As in inbound avenue to your current contact center, an outbound option to get your sales or service information pushed out, or as applications to help out your mobile workers, SMS can fill in some gaps you may not have realized before. **CIS**

*Tim Passios is Director of Solutions Marketing for Interactive Intelligence, Inc. and has more than 18 years experience in the contact center industry. Interactive Intelligence is a leading provider of IP business communications software and services for the contact center and the enterprise, with more than 3,000 installations in nearly 90 countries. For more information, contact Interactive Intelligence at [info@inin.com](mailto:info@inin.com) or (317) 872-3000.*





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## Performance Analytics: Critical Roles, Critical Needs

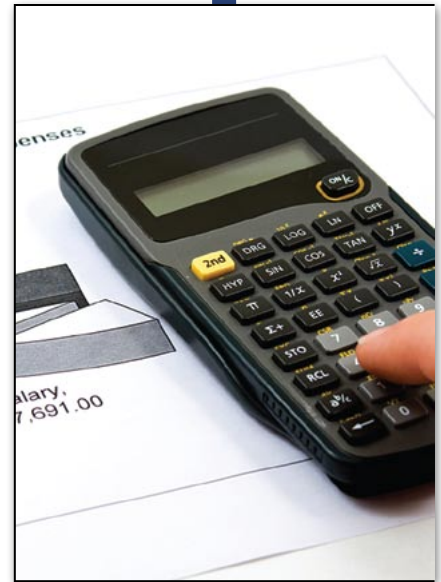
There has rarely been a more critical time to ensure that contact center performance is optimal thanks to today's challenging economy that is stressing cost containment and revenue maximization. Performance analytics solutions, when wisely designed and deployed, can play key role in meeting these objectives by identifying opportunities via interactions to cut expenses, increase agent effectiveness and output, retain customers and save sales, and grow revenues.

"Contact center managers are now realizing that they can make better resource allocation decisions based on broader trends with smarter analysis of existing processes," says Keith Dawson, Principal Analyst, Frost and Sullivan. "They are using analytics to demonstrate the revenue-generating capabilities of centers, especially when it comes to critical business-wide problems like customer retention and churn. Analytics gives them a chance to say 'we may be asking for x \$ for training, but if use it to identify agents with upsell skills, you'll see an ROI in just a few months.'"

Barak Eilam, corporate vice president and general manager, Interaction Business Applications, NICE Systems says that performance and interaction analytics have shifted from a 'nice to have' to a 'must have' in contact centers as these become more important to businesses. The tools give firms a quantifiable and structured way to drive higher performance by leveraging the insights in unstructured data, which account for 70 percent to 80 percent of information gathered by centers.

"In today's dynamic environment, trying to minimize the gap between contact center operations and overall business goals without a structured analytics solution is 'mission impossible'," says Eilam.

Oscar Alban, Principal Global Market Consultant, Verint Witness Actionable Solutions, has spent over 20 years in the contact center industry: starting out as agent and eventually managing the 1,200 person inbound/outbound contact center division of a Fortune 500 company. He welcomes performance analytics as it enables centers to be managed more proactively. Equally, if not more importantly, it allows managers to get to the root causes prompting customer complaints and rising call volumes. Business trends, opportunities and deficiencies can be rapidly identified and addressed. So can the needs from other non-customer facing departments that help shape the customer experience such as billing, claims processing and order fulfillment.



"If you talk with some contact center directors today the traditional response to issues is to 'chase the fire truck,' meaning reactively follow up on customer complaints," says Alban. "That's not going to cut it anymore with the cost and complexities in today multi-channel support environments. With performance analytics companies can take a more proactive customer-centric approach to sales, service and support."

### New and enhanced analytics solutions

There are more performance analytics solutions coming onto the market. TelStrat's recently released Engage Analyze indexes and audio mines words and phrases buried in calls using a patented phonetic audio search and recognition engine. Unlike older, less efficient speech-to-text approaches, it says phonetic speech search is not dependent on finite dictionary and grammar models which require constant maintenance. This makes it easy to accurately search for new competitors, product names, slang, and other dynamically changing terms.

Phonetic search technology also makes Engage Analyze much quicker than speech-to-text systems. Pre-processing or indexing of content is typically 60-80 times faster than real time, more than an order of magnitude faster than Large Vocabulary Continuous Speech Recognition (LVCSR) speech-to-text systems. Subsequent searches for words or phrases average over 30,000 times and reaching rates up to 80,000 times faster than real time. Engage Analyze enables audio mining up to 100 percent of calls, compared with limited (three to five percent sample rates) in LVCSR speech-to-text systems but without the massive computing power these demand.

UTOPY's SpeechMiner® V5.2 offers a significant increase in scalability and accuracy allowing the processing of unlimited customer call volume from contact centers. It includes built-in support for new languages like French, Dutch, Italian, German, Chinese (Mandarin and Cantonese) and Japanese. It supports more than 45 languages. The new offering also has built-in industry-specific



knowledge library for several verticals including communications, financial services, retail, healthcare, and utilities.

### Cutting costs with performance analytics

Performance analytics is being deployed effectively to reduce costs. One of the prime areas that companies are using it for is shrinking live agent zero-outs from voice self-service and calls from customers frustrated with websites as this has enormous ROI. Interaction costs with self-service are a fraction of those handled by live agents. For that reason they are also using analytics to determine which other live agent transactions can be automated.

“Firms want to keep people in self service, and in instances where this is successful figure out what made this self-service campaign or capability work so well so that they can do this with the other existing or new programs,” says Kraus.

Daniel Ziv, Vice President, Customer Interaction Analytics, Verint Witness Actionable Solutions, shared a customer example in which a credit card company was experiencing call volume spikes associated with lost passwords. The firm leveraged Verint’s speech analytics solution, and discovered that customers were being locked out of their online accounts because they could not remember the answers to selected ‘challenge’ questions. Consequently, their only option was to call the company’s contact center.

“With a process change that added the flexibility to select a different question, the company was able to reduce thousands of unnecessary calls, thereby simultaneously cutting costs and increasing customer satisfaction,” says Ziv.

Performance analytics is helping firms shrink average handle time (AHT), which helps both companies and customers. Jeff Schlueter, Vice President Marketing and Business Development, Nexidia points out that by carefully analyzing calls opportunities may be found to shorten them.

One key AHT determinant is time spent on hold. One health insurance company used speech analytics to show that calls relating to out-of-plan issues were taking significantly longer than the overall average handle time, much of which was spent with the customer on hold. By modifying the process, solving the issues without making the customer hold, and then notifying the customer with a callback, they significantly reduced the time and cost to handle these issues and also improved customers’ satisfaction.

“Contact centers need to reduce headcounts by shortening calls and driving more calls into the self-service, which will help them provide good customer service at less cost,” says Schlueter. “Analytics can get the vital information to make that possible.”

Performance analytics is helping to reduce costs in other channels. Ronald Hildebrandt, co-founder of Enkata and its senior vice president of marketing, pointed to a large financial services firm that in 60 percent of retail transactions saw web transactions within two days prior of visiting the branches. It applied analytics to calculate a true cross-channel first contact

resolution rate and identified the specific contact types where the Web fell short of retail capabilities, which prompted unnecessary branch visits. After a few minor web updates, the problem was solved and the company improved its customer experience and saved millions.

“We’re seeing increased cross-channel traction with performance analytics that links Web, contact center and retail channels together, which provides visibility into how these channels interact to produce an end-to-end customer experience,” says Hildebrandt. “Companies have been surprised by the amount of unnecessary cross-channel traffic that has been identified. If this were reduced, it would not only improve the customer experience but also save money.”

### Performance management, predictive analytics, and performance analytics

Aspect sees performance analytics as a subset of performance management. Performance management drives alignment and visibility across all levels of an organization. The demand for which is growing as its customers see dramatic results, such as improved productivity and enhanced customer interactions.

“Analytics is descriptive; for example, it might focus on the service level for the previous half hour or an agent’s real-time adherence to schedule,” explains Allyson Boudousquie, Director of Business Process Marketing, Aspect. “Performance management is prescriptive and enables a structured process through which a company manages and improves its overall performance against certain key performance indicators. Examples include improving customer satisfaction and customer retention for the year by aligning agents’ operational activities to support the customer satisfaction improvement objective.”

A companion to performance analytics is predictive analytics. Predictive analytics permits firms to anticipate customer behavior by mining the same voice and online interactions as performance analytics, but is also then pulls in other data, such as demographics, transactional and market research information, to analyze this complete dataset.

Colin Shearer, SPSS senior vice president of strategic analytics explains that employing predictive analytics can bolster performance analytics by enabling managers to obtain accurate behavior prediction, and use that to drive customer interactions. This data is then used to build and enhance customers’ profiles that can be used, when customers identify themselves, to guide them directly to IVR self-service, live agents or specialized care via CRM systems. Predictive analytics can, by intimately knowing customers, makes each call more successful, which improves performance, increases customer satisfaction and revenues.

“These days everyone is being stressed to get more out of existing assets,” explains Shearer. “One way to generate more value is to apply predictive and performance analytics together to make sure customers have better experience, remain more loyal and to do things like see if there are previously untapped sales opportunities.”





## Performance analytics issues and solutions

While there is little question that performance analytics is effective, in many instances it is being hobbled in its adoption by high costs that arise from having too many features that add to purchase price and to labor costs by having to hire dedicated analysts. All told these factors can in some cases add 50 percent or more of the total costs; speech analytics solutions typically price in the hundreds of thousands of dollars. Implementation times are in the 12 to 18 month range: twice to three times the tolerance of today's senior management.

"Even if there is a solid payoff at the ends of it the entry price is so high that only a handful of customers are going to be looking at it and even many of them are saying it is too cost-prohibitive to tackle," reports Kraus. "But by taking the bloat out of these products and providing simple to understand reporting more companies will buy, use, and benefit from these solutions."

Envision Telephony has done that with Envision InteractionIQ™ that simplifies speech data processing, search, and reporting from within audio recordings. An integrated component of the Envision Centricity WFO platform, it contains the core speech processing, capture, reporting and analysis capabilities needed to fully incorporate audio data into WFO analytics.

InteractionIQ does so at a fraction of the cost of standard speech solutions, by doing away with some of what the firm reports, via comments from its customers, are largely underutilized features. They include emotion detection because emotions such as anger do not necessarily translate into lost business, reports Envision's marketing director Jim Shulkin. Another tool, full-time transcription, often provides too much data for management to parse through when they need to quickly get important information such as cancellations. In this batch are real-time alerts that do grab urgent utterances that require responses, with examples including ending service. Yet serious problems with products or threats to agents or firms where real-time action is truly needed are limited.

Envision InteractionIQ features a processing filter that enables self-managing the total cost of speech analytics by focusing processing power on the most pertinent and relevant interaction. It also has a subscriptions tool to set-up 'saved searches' to have only filtered recordings including specific voice data delivered to an inbox to expedite review. It has an ad-hoc search that performs on-demand queries for new or specific terms as/when needed. There are 'Smart Tags' that permit unlimited terms to be marked in all processed interactions for immediate reference and "click through" ability to recordings during review.

"Up to now we have not seen widespread adoption of speech analytics even though it can offer tremendously valuable insights to agent, center and organizational performance and trends," says Frost's Dawson. "InteractionIQ drastically reduces the total cost of ownership for speech analytics while still delivering the market's core and most practical needs for speech processing technology."

Verint's new Impact 360 Speech Analytics Essentials solution features its proprietary Complete Semantic Index, which automatically identifies significant changes in customer behavior as expressed within recorded customer interactions. Such changes are proactively surfaced by the software's Automated Trend Analysis, which identifies increases or decreases in terms and phrases used during customer/agent conversations.

With the Complete Semantic Index, users do not need to know in advance what terms to search. Intuitive search engine-like, guided search capabilities—including contextual suggestions and search visualization functionality—help users find relevant calls quickly to determine the underlying causes of rising call volumes, costs and customer dissatisfaction.

"Most small and medium sized centers don't have the resources and time required to build search categories, nor the business analyst staff to interpret them," says Ziv. "The Impact 360 Speech Analytics Essentials really brings this type of technology into mainstream contact center operations without costly setup overhead, lengthy consulting engagements, and separate analysts."

To get the most out of performance analytics solutions firms need to apply them across all contact center functions: billing, collections, and sales as well as customer service, and in all channels, thereby giving them a 'single version of the truth'. Merced Systems' performance analytics products integrate data from all of these areas, giving managers a single view into every customer interaction.

"Firms need to understand where they are to know where they need to be," says Mark Gally, director of marketing at Merced Systems. "Performance analytics is today a must-have system in the contact center just like ACDs and workforce management, providing visibility, performance improvement, and delivering a culture of accountability. It is that window of where companies are today, that allows firms to know how best to tweak their operations in this difficult economy. It guides them along their overall process. To do that though they need a complete view of their customers via their analytics solutions." **CIS**

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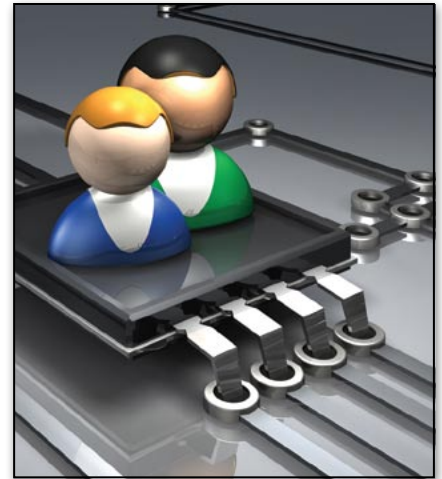
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by Brendan Read

## Supplier Survey: CRM to SMBs

**T**his month's Supplier Survey is focusing on CRM solutions to small-mid-sized businesses (SMBs). After reviewing the responses to questions on market, product, and vendor trends, including in this instance about mobile commerce and social networking, one firm's remarks have been selected to be published here. All of the replies will be appearing on TMCnet.com.



The featured company is Maximizer Software ([www.maximizer.com](http://www.maximizer.com)). Replying for the firm is Angie Hirata, Worldwide Director, Marketing & Business Development:

Because of its sheer size, the SMB marketplace is extremely fragmented and, therefore, not as easy to reach as the enterprise market. SMBs don't travel as much or gather in the same online places as large enterprises. SMBs really don't use CRM terminology, something you might find in a larger enterprise with a fully dedicated IT staff, but inherently do understand that they need to manage their sales prospects and customer databases better.

SMBs are more nimble than the giants, yet because they have smaller budgets, are very thorough in their purchase decisions. What drives them is the desire to grow, to service their customers better than their large enterprise counterparts. What's driving them right now is the need to stay afloat. In this down economy, they desperately need to increase sales. If there's a simple technology that enables them achieve these things without a lot of hassle, that's what they want.

SMBs have many choices when it comes to CRM vendors to help them grow their businesses. The market has already consolidated a bit, and there will continue to be some niche players that service specific verticals or holes that the traditional vendors don't fill. However, there is still a large market opportunity for the vendors because not all SMBs 'get' CRM yet. Pricing is quite competitive because SMBs don't have large budgets and there are enough competitors where some have dropped prices.

Any business regardless of size want the same things with CRM: enable staff to do their job better whether selling to or servicing customers, build stronger and more profitable relationships with customers, and give managers the insight they need to monitor and manage their business and staff. The difference is in the bells and whistles and how that's delivered. SMBs have always, and will continue to need a tool that's simple for their staff to manage and use, as they don't have the resources or luxury of time of large enterprises.

The downturn has made businesses more cautious in how much they are spending. Even if their business is doing OK financially, they are scrutinizing purchases 'just in case' something happens. The economic downturn has also caused some SMBs to outsource support functions that aren't core to their business. They also are more bullish on solutions that will give them greater or faster ROI. For example, some SMBs that already have CRM now want more benefits out of it and are implementing features like lead and case alerts, sales dashboards, and mobile CRM applications that leverage the software and data they already have.

Greater wireless networks and more online social networks are creating an environment of always-on information and significantly more available information for CRM systems. With mobile CRM, SMBs are quickly seeing the benefits of taking their client information on the road and not just their contact details and maps, but history of sales calls, cases, and e-mails. Social networks are giving SMBs access to more information on people than we ever imagined. If you're on LinkedIn or Facebook, you'd better bet that anyone trying to sell something to you or partner with you, is searching for you on those sites to see where you formerly worked, who you're connected to, and what you look like!

SMBs don't have the time or resources of large enterprises but want the same positive results from an investment in CRM. They also want great value – not just with competitive license prices – as they look at the overall cost including support, services, training, and other related software. So we provide a solution that is easy for SMB staff to deploy and use and which we provide the best value with the lowest total cost of ownership.

We also know that SMBs want a trusted advisor to help solve problems or give advice on how to best use CRM in their business. So we have a strong channel network that will service SMBs in their locations, as well as phone and email support directly from our experts. **CIS**



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By Tim Searcy



## Getting Here From There

**T**here is an old saying that “everyone wants to go to heaven, but nobody wants to die.” Makes sense. If I could get all the benefits without any of the pain, I should take it regardless of the topic, right? However, the natural order dictates a certain amount of sacrifice to achieve any desirable goal. Additionally, I have found that although it is difficult to plan a path from here (now) to there (future), it is possible to move backwards from there to here. So where is there?

The teleservices industry has had a steady goal to operate under no more scrutiny than any other marketing discipline. Simply put, all forms of commercial communication operate within levels of autonomy bordered by state and federal regulation. Teleservices has been under assault for over a decade to increasingly limit the operational ability of the channel under the guise of consumer protection. We justifiably believe that these limitations have been unfairly strict and focused upon addressing the problems created by a very small portion of the industry to the detriment of everyone else. Ideally, teleservices would function like any other commercial marketing vehicle with governmental regulation to prevent fraud or abuse, along with industry self regulation to create sustainability.

### How do we achieve this goal?

Start with the end in mind: These are not my words, but they have been echoed by great authors from Moses to Covey. The outcome must be defined as a balance and not as domination. The teleservices industry cannot hope to win back the hearts and minds of consumers against those that defraud them. In reality, fraud is not endemic to our channel, but it exists and is associated with the telephone. The target must be to secure consumer confidence and respect while at the same time acknowledging the need for aggressive enforcement.

Marital the necessary resources: Often when resources are discussed, people think of money, personnel and infrastructure. These are necessary elements of an overall strategy. However, the real resource the industry needs is information. The following questions need to be answered prior to a proper balance being achieved:

Can consumers and policymakers agree that a balance is a worthwhile goal? Without some acceptance of this fundamental belief, any effort is wasted. This will require substantial education and factual information. With a better understanding of the role teleservices plays in competition, less expensive goods and services and satisfaction, may come the ability to set fair guidelines that actually enhance the value of the channel.

What is enough? No one has been able to provide a clear and fair set of guidelines for what level of consumer protection is sufficient. Some advocates would have the industry remove all outbound calling, eliminate automated service by phone, and move all customer contact onshore. In a vacuum, these may seem like

good solutions, but we know that these kinds of changes would come at prices consumers and policymakers would be unwilling to pay. So where is the line? We believe the line is at consumer protection and market driven excellence. As long as consumers have choices, the free market will be the best arbiter of business practice. Consumers should be encouraged to choose based on the combination of product, price and service as well as the channel of best delivery for those items.

Can industry self regulate effectively enough? One of the great difficulties in implementing the American Teleservices Association (ATA)'s Self Regulatory Organization (ATA-SRO) has been to gain consensus. Marketers want to have all the freedom to compete, but recognize some limitations are in the best interest of the consumers and regulators. Just as we request that regulators draw a line that is fair, we must also meet the consumer at a point that is fair.

Create the dialog. There are MANY people interested and invested in the teleservices space. Consequently, the ATA has engaged almost all of them including politicians, regulators, consumer groups, technology professionals, international providers, and marketers. Everyone has a different agenda, but surprisingly all of them agree on two things: something has to change, or it will be changed for us, and it is not going to be easy.

Provide a sustainable solution: I encourage you to visit the ATA-SRO website ([www.atasroconnect.org](http://www.atasroconnect.org)) and learn more about what we are doing and how you can become engaged. The keys so far have been a framework that makes sense combined with regular calibration with key constituents. The ATA-SRO is designed to accredit institutions to prove their compliance with federal and state laws. Beyond that, the ATA is engaged in the future. We are working with industry to address concerns related to business to business calling, inbound up-sells, the use IVRs, and offshore service provision.

This experiment in industry democracy has already garnered great support. Many companies, and now a few industry groups, are beginning to demand ATA-SRO accreditation as a minimum performance standard in their outsourced contact center contracts. The ATA should see about 20 accredited firms in time for our annual convention in October, in New Orleans ([www.ata2009convention.org](http://www.ata2009convention.org)), as well as dozens of certified auditors. To get from here to there, we must get interested parties aligned and communicating. **CIS**





## Introducing the Outbound Call Center Online Community

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# CRM Executives Speak Out

These are challenging times for creating, developing, and maintaining customer relationships. More than ever, every customer — one who is willing to spend (and pay on time) — is golden. At the same time there are new channels: mobile and social media that customers are choosing and must be opened and maintained. Meanwhile the costs of attracting and keeping each customer must be minimized to maximize net revenues.



We approached leading customer relationship management (CRM) solutions suppliers for their insights on these issues, including the future direction of this product grouping to meet them. Here is a selection of their responses. The complete replies will appear on TMCnet.com.

## **Consona CRM ([www.consona.com](http://www.consona.com))**

### **Tim Hines, Vice President Product Management**

Given the economic climate, companies are doubling down on customer service and support investments. Budgets for marketing and sales initiatives have been diverted to improving the customer service and support infrastructure. This is long overdue. Too much time and money was spent on organizing a sales operation, and while important, it's just not all that technologically difficult.

Our approach is for companies to participate and ideally lead the discussion. Social technologies have given the customer a greater voice than they ever had and this is a very good thing. Companies need to address these technologies and leverage them for strategic advantage. In their operations, they need to establish a SMS channel into their support organization. They should integrate Facebook and Twitter into the 360 degree view of the customer and they should deploy a community for their customers to participate in. They need to understand the social structure of the new social media. There absolutely is a new language, an unwritten hierarchy of those that participate if you will and not, understanding and embracing this will be a disaster.

The concept of the CRM suite is just plain dead. Companies tried with sometimes tens of millions of dollars to isolate their internal operations into a single system. The reality is that these systems, most of which are mature and well designed caused different operations to conform to a procedure, sometimes at odds with how they are intentionally structured. So, it just didn't work.

We suggest that a system be designed so that each department leveraging can actually execute their operational processes

according to their charter, and that each department acquire manage and leverage whatever technology is necessary to accomplish this goal. Then through system integration, or if it is a well designed system that can handle federation of operational purpose, cohesion can be achieved. It is perhaps the longest path, but ultimately the best for a company.

SaaS is an extremely expensive option for most organizations in the short and long run. However, cloud deployments with term or perpetual licenses are now available, and this ultimately is the cheaper path that still gives you the flexibility of SaaS.

## **Microsoft Dynamics ([www.microsoft.com/dynamics](http://www.microsoft.com/dynamics))** **Brad Wilson, general manager, Microsoft Dynamics CRM, Microsoft Business Solutions.**

Ultimately, people who are equipped with a strong CRM system will be able to ride out tough economic times and come out on the other side in a better competitive position. You have to be proactive and structured about how you engage with your customers. The pools of people considering purchases are dwindling, so you have to make smart decisions about how you connect with them.

We realize that organizations are increasingly faced with supporting multiple mobile computing standards that frequently include combinations of Windows Mobile and other devices. Microsoft and TenDigits have partnered to deliver CRM to enterprises by providing centralized support for Windows Mobile and Blackberry devices, while also enabling user access to Dynamics CRM data even when disconnected.

Social technologies provide opportunities - and challenges - to the way that businesses understand and deal with individuals and groups. The ability to engage deeply with customers around activities that they spend time on, and to engage with their extended network of friends and family, gives businesses the opportunity to learn more, and to deliver more valuable products and services. On the other hand, the traditional one-to-one "dialogue" between a company and its customer is often disrupted as social groups and communities continue to



increase their relevance as a trusted source of information and buying preferences. While it's not clear which technologies and business models will ultimately win out in this space, businesses need to engage now to drive learning into the organization and to build new strategies and capabilities.

**Salesforce.com ([www.salesforce.com](http://www.salesforce.com))**  
**Al Falcione, Senior Director of Product Marketing**

In this economy, most companies do not have the capacity or desire to borrow money and make large capital purchases such as for data centers, hardware, and business software applications. Instead, they are turning to cloud computing and paying modest monthly fees to build and run enterprise applications.

CRM is even more important in this economic environment because companies need to keep every customer and close every deal. Salesforce CRM applications have helped its customers grow revenue by an average of 34 percent and productivity by 33 percent according to third party research of more than 3,500 customers.

These days, when you have an issue with a product or service, what do you do? You probably [Google](#) your query, or increasingly you are likely to turn to your social networks on Facebook or Twitter versus calling a customer service help line. Unfortunately, many of today's contact centers are disconnected from these social conversations. Agents can't push solutions out to portals easily, nor can they benefit in real time from the knowledge that is being created by the customer community. With the Salesforce Service Cloud, companies and service agents can join these conversations, tapping into the knowledge and conversations happening in the cloud today.

Today, companies are demanding fast results, low risk, and are unwilling to lay out large, upfront capital costs for technology. The SaaS, or cloud computing model, is replacing traditional CRM software by offering a low risk, pay-as-you-go approach to CRM where companies can see results quickly.

**Sword Ciboodle ([www.sword-ciboodle.com](http://www.sword-ciboodle.com))**  
**Ted Hartley, Chief Operating Officer, Sword Ciboodle Americas**

The current recovery will have very few similarities with previous booms. In the past, when downturns and ultimately upturns took place, organizations controlled the relationship between them and their customers. Today, this balance of power has shifted in favor of the customer, and the phrase 'the customer is king' has never been more true. To that end, consumer buying patterns will be shaped by how well companies interact with customers, listen to their complaints and feedback, and respond to their needs.

Consumers will also be more cautious than with previous booms and will direct their demand towards organizations they

feel they can trust and develop a strong relationship with. The most recent downturn has transferred power to the consumer, increasing their already high expectations and requiring companies to be transparent and authentic in all engagements. This will improve retention and help to convert customers who are 'on the fence' buyers. CRM solution providers will need to ensure that their products are able to cope with these factors by providing companies with the agility to respond to changing customer demands while also improving transparency.

Mobile devices enable an organization to extend the customer experience from one spectrum of service to another. The ability to capture details, enquiries, and cross- and up-sell opportunities while standing in front of the customer is a massive opportunity for an organization. However, this opportunity can only be fully realized if real-time synchronization with the customer experience application exists. Without this, crucial information can be lost, opportunities for additional revenue missed, and the enterprise view of the customer profile can become incorrect.

For companies that utilize a process-based approach to CRM, supporting mobility is simply the addition of another channel that is already supported by their existing CRM investment. For these companies, it's about building customer processes once, deploying anywhere, and leveraging existing investments to enable more channels, more choices, more customer touchpoints and better service. Companies that do not have a process-based CRM architecture will face more challenges when trying to integrate mobility.

We are seeing more need for companies to integrate the social media experience into their CRM systems and strategies. Companies should evaluate the social media assets available and compare them to their strategic vision for how they want to engage with the customer. It's not about using the most social tools, but which ones are right for your business and your customers.

Around 10-15 years ago, there was a trend toward multiple CRM point solutions, with a range of products targeting niche areas, such as marketing automation, sales force automation, and customer service. Today, there is a new trend around point solutions with different delivery and deployment models, including software as a service, open source, and platforms as a service, offering companies more options with which to customize their own solution.

But don't be fooled into thinking that large enterprise-wide initiatives are a thing of the past. They are, in fact, still very much out there, but are being deployed in smaller bursts with a 'think big, start small' vision, rather than the traditional big bang approach. This phased approach to deployment makes the solution self-funding, delivers early ROI, and starts improving the customer experience from the outset. **CIS**



## The ROI to Attend IT EXPO

**D**oing more with less is today's mantra. ITEXPO West, which is taking place Sept. 1-3, 2009 at the Los Angeles Convention Center is the best venue to find out how to do this by learning about new and practical solutions and how best to buy and apply them to deliver maximum ROI for your contact center.



**ITEXPO** West is about leading-edge productivity-and-service-enhancing and cost-saving technologies such as broadband, call recording, unified communications (UC), voice over IP, and wireless. Information and insight about them are communicated through informative interactive conference sessions and exhibits.

### ITEXPO West Conference

ITEXPO conference has several tracks including one dedicated for contact centers. Here is a snapshot of the sessions being featured this year:

- UC in the contact center

This session will address the role that the contact center plays in a successful UC strategy. It will focus on best practices for leveraging contact center and UC applications in tandem and how companies can make use of existing and next generation technologies to make this happen.

- Driving efficiency and compliance in outbound contact centers

This talk will look at recent trends in outbound contact centers, including new regulations, new dynamics in agent employment, and new technology advances that combine to yield a unique opportunity for improvement. You will be presented with architectures and best practices to leverage this context for superior results.

- Next generation contact center applications

You will learn how to make the contact center more valuable to the business by incorporating next generation features like service-oriented architecture and Web services to help drive greater efficiency and flexibility in the contact center, reduce costs, and speed time-to-revenue.

- Agent performance and ROI

The focus is on the necessity of agent performance management solutions and how to build a solid business case and ROI

for such tools. You will find out how to get the best performance out of agents as well as be presented with studies on customer satisfaction and how the two can be aligned.

- IP quality assurance

This is an examination of assuring IP telephony voice quality in the contact center and the enterprise. The concepts and discussions will revolve around active call and multilayer monitoring, using performance management to assure that service level objectives are met and how recurring failures can be identified and prevented in real-time.

- Hosted services

A look into the issues surrounding implementing a hosted on demand delivery of contact center service and provide a guide as to where these services are and are not appropriate. It will provide a generic guide to new applications that the on demand platforms can allow as well as review the ROI model for on demand services.

- Voice documentation and recording

An examination of how voice documentation technology is used to manage risks and ensure ethical, professional and customer-friendly employee conduct. Specific topics will include compliance, personnel development and collaboration and how voice documentation can contribute to each of these areas. It will also address the role of VoIP call recording, different implementation approaches, and keys to ensure a smooth implementation.

There is in addition an entire track on UC with sessions including:

- Leveraging UC to optimize the customer experience

The presentation will discuss how to leverage contact center and UC applications in tandem to drive increased productivity and more responsive service, including what organizations should look for from technology partners. It will also identify





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UC strategies that you can begin to implement today to realize more significant ROI, get ahead of business demand and gain a competitive advantage

- 'Best of Breed' versus 'Best of Suite' when buying UC solutions

This session covers picking discrete UC tools or purchasing bundles. You may already have a UC component, such as IM. Do you buy each separately as they come onto the market or do you buy an integrated package when these appear?

#### ITEXPO West Exhibitors

There are a wide range of top firms exhibiting at ITEXPO West. Here are just a few of the companies with contact center/contact center-related solutions that will be there:

- [Aastra](#)
- Altech
- [Avaya](#)
- Duxsoft

- Infradapt
- Interactive Intelligence
- OrecX
- [Qwest](#)
- [Sipera](#)
- Volt Delta

Yes TMC's magazines, sites, and webinars provide excellent information on these topics and companies. Yet they supplement rather than substitute for the real-time direct knowledge and insights gained by attending sessions, speaking to presenters and other attendees, and meeting with and seeing demos from exhibitors. Information that you can beehive to your staff when you get back or directly via your wireless device...which further boosts the value and ROI from being at ITEXPO West.

Register today at our site <http://www.tmcnet.com/voip/conference/west-2009/overview/w09-registration.aspx> and see you at IT EXPO West! **CIS**



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## Get Going With Hosting

Few enterprises today own their own buildings, vehicle fleets, or hardware like copiers. Instead they lease them and for good reasons. These include freeing capital expenditures to be used where these dollars can generate the greatest ROI. It also includes flexibility when business needs change from new opportunities or downsizing; there are no costly assets to purchase/install or unload, which takes scarce time.

The same arguments can be and are applied to contact center solutions known as hosting or cloud computing. Drew Kraus, research vice president, [Gartner](#) adds that leasing/hosting also avoids internal battles over which products to keep in a merger/acquisition. He reports that more firms are selecting hosted solutions, in particular CRM, IVR, and to an extent ACD and routing.

Dave Van Everen, vice president, product management, Five9 reports that more enterprises turning to solutions to support remote/home agents, and blended insource/outsource, and on-shore/offshore operations. It is also becoming a popular choice for teleservices firms.

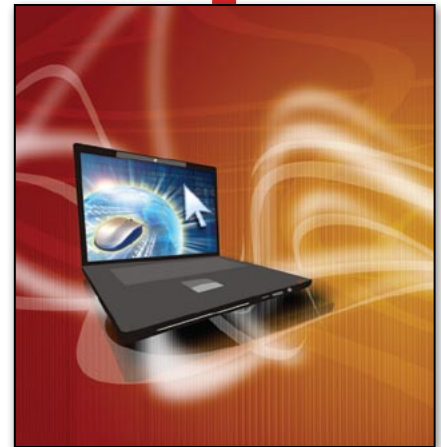
"We're seeing many outsourcers become Five9 clients, and in doing so go out and win new accounts," says Van Everen. "They can quickly add seats to their Five9 environment, and often they credit this agility as a competitive advantage."

Hosting takes up less IT resources and consulting dollars. Alaska Airlines deployed Varolii's automated outbound voice notification solution to improve service and deflect customers' calls arising from flight delays and cancellations. It has proven very quite popular; it successfully communicated with more than 100,000 passengers and now supports e-mail and wireless devices.

As a hosted service, Varolii did not place an additional burden on the airline's IT resources. Its internal staff can create, manage, and edit Varolii applications without coding; it is also saving considerably on consulting services.

"I've done a lot of ROI studies of our technologies and this is by far the quickest payback I've seen," says Karen Wells, Manager of Network Operations at Alaska Airlines.

Hosting has another key benefit: the firms providing them have a vested interest in making the solutions work; these are not 'fire-and-forget' relationships, which can be the case with premises-based solutions. For example Frontline Call Center, a teleservices firm based in Washington State's went with inContact in 2007 after struggling with premises-installed software and has been with them ever since.



"I moved everything over to inContact and have never been happier," says company founder Jill Blankenship. "They provide me with detailed reporting, no down time, great support, and the ability to grow my company. They truly care about the success of my firm."

### Hosting challenges

There are challenges with contact center hosting. Most of these, reports Kraus, are perceptual: mainly a lack of security and customizability and integration to user companies for data and business processes. These issues will be resolved, he says, when suppliers begin to make a better case for hosting overall rather than focusing on why their hosted solutions are better than their competitors' products. Hosting will be a long time coming in applications where the state of the technology is presently such where there is a large amount of custom setup and integration work required. Examples include performance analytics and workforce optimization.

"When more companies become persuaded to come in and kick the tires on hosting they will find that that it can meet stringent security requirements, it does offer flexibility, and it can do a lot more than they had expected it to do," says Kraus.

Here are several case studies that illustrate the case for hosted solutions:

### Musicnotes Stays in Tune with Customers via [nGenera CIM](#)

Musicnotes.com is a leading Internet-based sheet music store, offering over 100,000 pieces of digital sheet music and guitar tablature; it also sells books. It recently sold its five-millionth download since the site launched in 1999 and its current growth rate remains strong at 20 percent year-over-year. The firm is on Internet Retailer's Top 100 list.

To grow its business Musicnotes wanted to make its service more accessible and helpful to customers by giving them a convenient and user-friendly way for them to obtain immediate answers to their questions and concerns, without adding personnel. The Internet firm has five agents in their Wisconsin office. It also wanted to offer chat, which it says its younger customers have a growing preference for, in addition to phone and e-mail contacts.



Musicnotes selected nGenera CIM, specifically its nGen Knowledgebase and nChat modules, delivered via hosting. The nGen Knowledgebase is accessible to both agents and customers. The firm specified hosted delivery to avoid investing in additional hardware.

Musicnotes installed the solutions in a few days in December 2007. The firm found the setup easy and intuitive. The chat templates provided were simple to customize. nGenera CIM offers free training which its found extremely helpful. This coupled with the tools' ease of use enabled its customer service team to swiftly come up to speed on the new technology and channel.

"We have been very pleased with the nGenera CIM solutions," says Kristin Gilbertson, Musicnotes' Director, Customer Service. "Our customers appreciate the option to communicate with us via chat; we've seen a steady increase in chat usage since deployment. Another real plus is that our agents really like the tools so it has been simple to get everyone using them."

### Contact Solutions Assists onProcess

OnProcess Technology provides comprehensive outsourced asset retrieval and proactive 'customer experience management programs' in select vertical markets. It conducts business in 11 languages in the Americas, Europe, and Asia. OnProcess has 3 contact centers with a total of 430 agents. The center is open 8am to 11pm.

About 85 percent of the inbound call traffic at OnProcess is received as a result of outbound calls OnProcess has placed to its customers. Previously, when customers returned these calls after hours, they left a voicemail that was manually retrieved by agents the next day. This manual process proved to be a time-consuming and inefficient method for handling customer call backs.

To improve customer service OnProcess decided to make customer access available 24/7 with the help of the voice portal. The voice portal would permit its clients to update the status of returns in real-time, and at a fraction of the cost of hiring and scheduling agents to take those calls. The voice portal would also lower interaction costs when the center was open.

OnProcess chose to have the voice portal hosted and implemented by Contact Solutions' On-Demand Services in June 2008. The Contact Solutions' service is fully integrated with OnProcess' host systems to provide real-time retrieval status and updates. Transfer to live agents is always supported during the contact center hours of operations. After-hours, calls are sent to OnProcess via a nightly data feed for next-day processing by OnProcess staff.

The Contact Solutions On-Demand program has worked out very well for OnProcess. It achieved a 27.2 percent completion rate after go-live compared with 20 percent projected. It is now witnessing 50 percent automated interactions, a high rate for this type of complex transaction, thanks to ongoing improvement releases from the provider.

"We had no self service IVR prior to Contact Solutions," explains Pam Roddy, OnProcess Vice President-Operations. "We are able to reach a larger customer base with the expanded hours. We leveraged

their expertise to help us make critical business decisions. Going to a hosted model and Contact Solutions was an easy move."

### iPass Takes Pass on Premises, Goes with Contactual

iPass serves broadband solutions for enterprise customers worldwide connecting mobile workers, home offices, branch and retail locations. It offers device management, security validation and unified billing. It serves hundreds of wireless, broadband and dial-up providers in 160 countries to give iPass customers' employees a single user experience using 3G mobile broadband, Wi-Fi hotspots, hotel Ethernet and other access methods.

The firm began searching for a virtual call center solution in 2006 following an acquisition that would allow it to handle customer service calls through four remote office locations and an outsourced contact center. It has over 100 agents in the U.S., U.K., Australia, Japan and India. It looked at

iPass went hosted because after much examination it decided against bringing all of its agents in-house. Jeanine Stephens, Director of iPass IT because her company quickly realized the complexities and challenges going on premises would cause along with a substantial investment in hardware, labor, maintenance, and licenses.

iPass chose Contactual because it would scale immediately and improve customer interactions without the costs of a premise-based system. It offered a superior ability to organize and set up real-time monitoring and recording functions and would integrate with iPass's CRM system.

The implementation has been very successful. Contactual helped streamline supervision and brought information together in one system. That centralization and synergy made the firm more productive..

"We have realized tremendous value from using Contactual's hosted contact center solution; it has transformed our customer interaction operation into a truly unified function," says Stephens. "Before, it cost us nearly double to support an in-house contact center that included all of the infrastructure components: hardware, software, personnel, maintenance, and licenses. Contactual also requires little to no support, which allows me to manage other areas of our operations." **CIS**

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

**Contact Solutions**  
www.contactsolutions.com

**Contactual**  
www.contactual.com

**Five9**  
www.five9.com

**inContact**  
www.incontact.com

**nGenera**  
www.nGenera.com

**Varolli**  
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## The IP Contact Center Technology Pioneer Awards

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



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

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

### **Allegiance**

<http://www.allegiance.com>  
*Allegiance Engage Platform*

### **Aplicor Inc.**

[http://www.aplicor.com/customer\\_support.htm](http://www.aplicor.com/customer_support.htm)  
*Aplicor Enterprise*

### **Convergys**

<http://www.convergys.com>  
*Intervoice IP Contact Center*

### **CosmoCom**

<http://www.cosmocom.com>  
*CosmoCall Universe 6*

### **EasyRun**

<http://www.easyrun.com>  
*EPICAce*

### **Envision Telephony**

<http://www.envisioninc.com>  
*Envision Centricity™*

### **Five9, Inc**

<http://www.five9.com>  
*Five9 Virtual Call Center Suite*

### **Ifbyphone**

<http://public.ifbyphone.com>  
*Ifbyphone V3*

### **inContact**

<http://www.incontact.com>  
*inContact*

### **Integrated Broadband Services**

<http://www.ibbs.com>  
*Broadband Explorer 4.6*

### **IntelliResponse Systems Inc.**

<http://www.intelliresponse.com>  
*IntelliResponse Instant Answer Agent*

### **Interactive Intelligence**

<http://www.inin.com>  
*Interaction Feedback*

### **LeasePlan USA**

<http://www.us.leaseplan.com>  
*eRepair*

### **Mitel**

<http://www.mitel.com>  
*Mitel Customer Interactions Solutions*

### **NICE**

<http://www.nice.com>  
*NICE Perform 3.2*

### **Nortel**

<http://www.nortel.com>  
*Nortel Contact Center 7.0*

### **Plantronics Inc**

<http://www.plantronics.com>  
*Plantronics EncorePro*

### **Plantronics, Inc**

<http://www.plantronics.com>  
*IP40*

### **salesforce.com**

<http://www.salesforce.com>  
*Service Cloud*

### **Sangoma**

<http://www.sangoma.com>  
*NetBorder Call Analyzer*

### **Servion Global Solutions Ltd.**

<http://www.servion.com>  
*Medius LCM*

### **Servion Global Solutions Ltd.**

<http://www.servion.com>  
*iAssist*

### **Toshiba America Information Systems, Telecommunication Systems Division**

<http://www.telecom.toshiba.com>  
*Strategy View*

### **Transera Communications, Inc.**

<http://www.transerainc.com>  
*Seratel*

### **UTOPY**

<http://www.utopy.com>  
*UTOPY SpeechMiner*

### **Varolii Corporation**

<http://www.varolii.com>  
*Unified Varolii Interact Communications Platform*

### **Verint Witness Actionable Solutions**

<http://www.verint.com>  
*Impact 360 IP Recording*

### **Voice Print International, Inc.**

<http://www.VPI-corp.com>  
*VPI CAPTURE PRO*

### **Zeacom**

<http://www.zeacom.com>  
*Zeacom Communications Center version 5*

Citrix ..... Cover 3  
[www.citrix.com](http://www.citrix.com)

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

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<http://callcenterinfo.tmcnet.com>

Global Headset Community ..... 15  
<http://headsets.tmcnet.com>

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**Brendan B. Read,**  
Senior Contributing Editor



## Ending Charity Fraud, Misrepresentation, and Bad Practices

**I**f there is a hereafter there should be an especially nasty place for those who manipulate individuals' altruistic instincts by conning them — typically via telemarketing — to hand over cash to bogus front organizations that funnel the money into undeserved pockets.

Barring that the authorities should have these skels arrested, charged with fraud and if pled or found guilty sentence them to the vilest community service assignments there are: like picking garbage and cleaning cesspools, septic tanks, stables and zoo pens in 100-degree heat. Or if prosecutions are not feasible, giving the defendants the 'option' of paying the penalty by such 'barter' and strongly encouraging them to take it.

The Federal Trade Commission has caught a few of these vermin in its traps. The FTC, joined by 48 states, recently brought 76 enforcement actions against 32 fundraising companies, 22 non-profits or purported to be ones on whose behalf fund were solicited, and 31 individuals in "Operation False Charity". These include two FTC actions against alleged sham non-profits and the telemarketers who made deceptive claims about these so-called charities.

What is more disturbing, but more commonplace unfortunately are misrepresentations made by legitimate telemarketers calling on behalf of actual charities to boost their takes and what the public consensus appears to be too-low gains (15 percent or less) by these nonprofits. A recent news story about teleservices firm CDG closing down several of its contact centers also includes a mention that the [FTC](#) has looked at the firm. To cite the South Florida Business Journal: "The company's tactics have come under scrutiny from the Federal Trade Commission and others who allege CDG exaggerates the amount of donations that go toward charitable causes."

In defense of CDG and other teleservices firms, and their charity clientele, while the returns seem low there are huge costs — mainly labor — in managing outbound fundraising campaigns. While these companies can significantly lower the expenses and increase the haul such as with offshoring and more autodialing do existing and prospective donors, and clients want that?

Charities point out, correctly, that what they have left over is more than what they had before their campaigns. Chuck Hurley, chief executive of Mothers Against Drunk Driving told the Long Island Business News, in a story published Oct.10,

2008, that MADD national tried more 'down-home methods of fundraising', but they failed. MADD national in 2005 lost money on golf tournaments, made a mere \$585 after expenses on walking, running and biking events and earned only \$326 on dinners and luncheons.

"If you think it's easy to raise money for a nonprofit organization, even one as important as MADD, you're new to this," said Hurley.

Yet charities run the risk of losing credibility with donors and the public with such campaigns. If the misrepresentations and low takes continue and if the telemarketers annoy people with too many live agent or autodialed calls, they could face legislated restrictions on their fine efforts. Just like what happened with commercial telemarketers.

To prevent that from happening with charities there needs to be reform of telemarketed fundraising. There should be a combination of stiffer and aggressively enforced laws and penalties to reflect the vileness of the fraud, ways to remove the temptation of misrepresentation, and a review of practices to increase returns while maintaining a viable teleservices industry.

To make these changes happen organizations such as the American Teleservices Association, the Direct Marketing Association, and the Canadian Marketing Association and the charities need to step up to the (collection) plate to come up with best practices that become standards that in turn form the basis of laws. It is in their best interests, and the public's to create a feasible consensus solution set that the lawmakers and regulators can support and put in place.

By making worthy causes more worthy to donate and by sending and at the same time delivering a tough message to those parasites that infect and abuse individuals' good nature as unwitting hosts, more people and organizations can get the help they need. This is the least we can do for those who have and continue to serve us and who try to make our world a better place. **CIS**





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