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Economy Making
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7 Common Mistakes

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- Ask The Expert: Communications-Based Process Automation
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Nadji Tehrani, CEO, Technology Marketing Corp.

THINKING OUTSIDE THE BOX CREATING NEW JOBS FOR AMERICA... WITHOUT SPENDING \$819 BILLION A MESSAGE TO PRESIDENT OBAMA

I watch with fear and amazement as our Government takes on responsibilities best left to the private sector. Government should stop pretending and stay away from things that are not their core competency. Just look at two prime examples: Amtrak and the U.S. Postal Service. These two entities are forever losing money as Washington throws good money after bad propping them up. In my opinion Government has never proven itself able to manage anything of this nature. I have come up with several ideas designed to help keep America the land of opportunity — not the land of entitlement.

Some New and Alternative Concepts:

- Let the private sector do it.
- Handicapped by huge bureaucracy and inefficiency and partisan politics, the Government is not able to effectively produce jobs, however genuine its intentions are.
- **To me, the Government must focus on supporting small to mid size companies, which have a PROVEN TRACK RECORD OF PRODUCING JOBS.** In fact, small and medium-sized businesses (SMBs) produce over 90% of all new jobs. NO other entity can do this and don't look for shortcuts.
- Provide massive incentives, tax cuts for all Americans including entrepreneurs who create 90% of the jobs as owners/founders of SMBs who may make \$250,000 or more. Over taxing entrepreneurs will force them to take their businesses (and millions of jobs) offshore where they will pay little or no tax.
- Call it what you will, a one-time bailout, stimulus, or entitlement...it will NEVER WORK. Please don't bankrupt America with wasteful spending...Have you heard the old adage: "Give a man a fish...and you feed him for one day. Teach a man how to fish...and he will feed himself for the rest of his life."

Let's Be Honest

Historically, the Government has never been able to effectively create jobs even with massive wasteful spending!

In short, **job creation is the "core competency" of small business**, not that of the Government and that's why many people think that the proposed stimulus package will not work. In fact, on January 28th, *The Wall Street Journal* editorial stated that **only 12% of the \$819 billion stimulus package will be used for job creation!!** That is why the business press, CNBC and many financial experts, Senators and Congressmen have called the stimulus package, "a social grab bag of wasteful spending loaded with pork barrel spending."

Here Are Some Cost Effective Ideas to Create Jobs and Help the U.S. Economy

Congratulations to the Top 50 Outbound Teleservices Agencies

As the industry's leading publication since 1982, it is our distinct honor to congratulate all the companies in the 24th Annual Top 50 Teleservices Agencies Ranking (outbound). To see the list of winners, turn to page 16. By becoming a Top 50 Teleservices Agency, you have distinguished your company as one of the very best in the outsourced teleservices, customer care/CRM industry. Be sure to inform your customers and prospects of this great news, for awards without marketing and differentiation are wasted! Please read my Publisher's Outlook titled "Award Marketing" at www.tmcnet.com/2769.1



- Vigorously cut unnecessary and pork barrel type spending;
- Cut overall spending;
- Cut taxes by 20%;
- Eliminate capital gains tax to encourage investment;
- Provide incentives for SMBs to create jobs;
- Provide incentives for call centers to return to the U.S. from offshore;

- Tax companies who have sent jobs offshore – some offshore companies are doing a lousy job anyway;
- Give incentives for SMBs to avoid layoffs;
- Bail out the SMBs, not the large fat cats who got us in this mess in the first place
- How about Marketing America™? As the evangelists of this industry, we (TMC) can no doubt help the Government to market America and bring many new jobs to the U.S.
- How about insourcing America? TMC can provide several ideas and how-to guidance on this.
- Call centers hired 5 million people in the U.S. in 1999. We can do that again. Again, we at TMC would commit to help evangelize and assist the Government to expand the industry.

5 Million Call Center Jobs? In the U.S.? Yes, We Can Do it Again

In the late 1990's, call centers were growing at the rate of 25–30% per year.

As the founders of the industry, owners of registered trademark for Telemarketing® and the publishers of the industry's first and preeminent magazine since 1982, we had and continue to have our hand on the pulse of the industry. The call center/contact center and CRM industry continues to grow.

However, starting 1998 and beyond, two factors took away 60–70% of the 5 million call center jobs in the US. The two factors were:

- Ill advised, massive and crippling regulations such as DO NOT CALL and;
- Much cheaper labor in offshore locations.

After losing millions of dollars (if not billions) and losing many customers, the outsourcers (Corporate America) who set up call centers

offshore learned that you get what you pay for! Therefore, several companies have left offshore and set up their call centers in the U.S. or outsourced their jobs to the U.S.-based teleservices companies.

MARKETING AMERICA™

If Mr. Obama is willing to help us with proper incentives to revitalize the very labor intensive, job producing call center industry, I think we can get most of the offshore U.S. companies back to our shores where they belong. In addition, I would be delighted to head up the Department of Marketing America™, to help bring millions of jobs to America from forward-thinking global companies who want to sell their products to the World's No. 1 market: The United States of America. **CIS**

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



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Rich Tehrani, Group Publisher, Technology Marketing Corp.



Bestsourcing Contact Center Agents

In a conversation with telecom carrier Level 3 I just learned they recently ceased all of their customer service operations in India and have brought them back to the U.S. The agents are located near the company's NOCs nationwide. Company executives tell me that India still has strengths in performing back office operations but this move will be positive for customer service levels going forward.

This is not to say the U.S. is the only country with new contact center jobs. In fact Telecom New Zealand just decided that the economic environment they live in makes for a great opportunity to hire contact center agents in the Philippines. A year-long trial demonstrated to company decision-makers that staff located offshore delivered strong results in areas where specific technical knowledge was important.

It seems like service providers are making most of the contact center agent news as [Verizon](#) will be adding 60 new agent positions in Hamilton, New Jersey.

"We're looking for great people to help us grow and succeed," said Michelle Swittenberg, Verizon's vice president of sales, mid-Atlantic region. "With surging demand for Verizon FiOS and our other leading products and services, these new team members will help us take our great customer service and sales support to an entirely new level."

But who needs to hire people in a center when homesourcing has become such a rage. TMC's Brendan Read, Customer Interaction Solutions' Senior Contributing Editor is excited when he talks about the growth in this area. This enthusiasm is not lost on [IDC](#) who predict the homesourcing market will exceed 300,000 agents by 2010. Perhaps part of the reason for the growth is that monitoring tools allow companies to keep tabs on what is happening and they can save \$10/hour per agent by keeping them home. Considering the economy it is not surprising the lower priced option is what companies will choose..

[Contactual](#) too has jumped on the homeshoring bandwagon with their latest Contactual OnDemand Contact Center Version 6.

The company has added these new features better security, a new reporting API and an improved IVR editor. It also has a redesigned agent toolbar, ability to broadcast notices to agent groups, enhanced chat functions and desktop sharing to make agents more productive and improve job satisfaction. Platform capacity, stability and interactive toolbar performance are all significantly improved over previous versions.

And they had this to say about home agents:

No commute for your agents means your company will decrease its environmental impact, and you'll expand your ability to offer employment opportunities to homebound candidates. Your agents and supervisors can be located anywhere in the

country and be just as productive as if they were all working in the same room.

With Contactual your home agents are up and running in less than a week. The agent interface makes it easy for them to learn and use the application.

Are you afraid that your call center supervisors won't be able to effectively manage the home agent workforce? Don't be – the Contactual solution gives supervisors access to critical call center metrics in real time. Call reporting, monitoring, service level management, historical reports and more are all available on demand.

Municipal Contact Centers

One area of growth for contact centers is certainly municipalities as they now have lots of stimulus dollars to spend. This is why QScend Technologies, a company focusing on municipal CRM solutions has just released enhancements to its QAlert Municipal CRM software which now includes new features such as a full-blown knowledge base, customizable reporting and charting, and a citizen self-service center.

QScend President Keith LeBeau said the product can be implemented as a full 311 call center product or "in a decentralized environment, in which several departments may be entering non-emergency citizen issues."

Contact Center Quality

In quality news, CVS Caremark Corporation announced this week that its Customer Care Centers were recognized for the third time by J.D. Power and Associates Certified Call Center Program for customer service excellence.

The company was reportedly recognized for providing an Outstanding "Customer Service Experience" at their Caremark Customer Care Centers in Arizona, Missouri, Pennsylvania, Tennessee and Texas.

In all, the troubled economic environment seems to present an opportunity for companies to find ways to reduce costs by using home agents and outsourcing even to other countries as needed i.e. 'bestsourcing'. In addition with the price of labor falling in the U.S. due to higher levels of unemployment it seems like it is time for companies to reevaluate their offshoring strategy to improve customer-retaining service. **CIS**

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Contact Center Challenges in a Tough Economy

A declining economy affects how contact centers operate. Inside an organization, the competition for resources pits the labor-intensive customer care operation against other profit centers. In past recessions, contact centers have fared badly, because they've been seen as easy places to make cuts in headcount and to defer infrastructure spending. This time, though contact centers are just as vulnerable, they should be able to make a better case for their value, and for the value of investing in them.

Historically, the contact center is one of the first, and easiest places to make cuts when the economy sours. As we head into what may become a major, long-lasting decline, the progress that the industry has made is clearly at risk. Evidence suggests that there is already a reversion to the traditional stance of using the contact center to contain costs.

When facing a resource crunch, decision-makers need to factor more variables into their thinking. They need to consider the potential for revenue generation from the contact center, and whether it makes sense to neglect that for short-term budgeting. They need to consider the relative costs of customer retention versus customer acquisition.

Executives are faced with a complex calculus of forces. Unfortunately the loudest and clearest ones are usually those that argue for circling the wagons and cutting costs. Because of that, contact center professionals need to redefine what exactly is meant by smart management: is it what gets you through the next quarter? Or what sets you up to have an outstanding 2010 or 2011?

Contact center practitioners must confront several important challenges in order to come out of a serious downturn poised for growth:

#1: Preserving the positive revenue-generation stance in the face of lower budgets. There will be strong pressure placed on the contact center to revert to the traditional cost-control operational models. The savvy contact center manager will not resist, but will also present alternative scenarios that emphasize opportunities to grow revenue using those same resources. For example, using training to find agents who have sales skills, and then deploying them in cross-sell and upsell opportunities.

#2: Preserving efficiencies and satisfaction levels with lower or flat headcount. Gains in productivity originally came from new technologies, like workforce management software. But over time, managers became expert at deftly manipulating the automated tools at their disposal to make the most expensive component of the contact center — the labor — much more productive. Performance optimization tools and better training have made it much easier to measure and boost customer satisfaction. The challenge as times toughen will be to hold on to those gains even as budgets are tightened and centers are asked to do more with less.

#3: Communicating the contact center's value to those who hold the purse strings. This is perhaps the hardest challenge of all. In previous recessions (especially the deep one from 1990–91), the contact center was seen as an extension of the company's operations department. It was seen to produce little value overall. This economic dip finds us in a different state — the tools and metrics are now available to contact center managers to articulate a) the importance of customer satisfaction to the bottom line and b) the role of the contact center in making it happen. It is up to the center's managers to make that case, instead of assuming that it is clear and explicit.

Those challenges are serious, but a declining economy opens the door to making substantive changes in operations that can pay long term dividends.

This is the time to itemize and attack the business practices that may once have made sense but don't any longer; procedures put in place by previous managers ago that now have no justification that you can discern. Or policies that have a political constituency somewhere in the organization but that work against contact center agent productivity.

Another opportunity is the chance to adjust the external components of the customer service strategy. This is the moment, for example, to turn customers towards less expensive and labor-intensive modes of communication, like e-mail or chat. Or, to begin using proactive automated outbound notification calls (or SMS messages) to customers to head off informational inbound calls.

And a critical part of that strategy is to direct customers to self-service whenever possible. Part of the resource re-allocation that is spawned by the economic uncertainty should be directed towards improving IVR call flow and enhancing the breadth of applications that are provided through voice self-service portals.

History tells us that an economic decline presents a fork in the road for companies. They can take the short-term path, and reduce costs in their customer contact infrastructures through attrition and headcount cuts. Or, they can take a longer view, and use this as a period in which to reevaluate their basic processes, goals and produce a roadmap for a better, more profitable customer relationship when the economy improves. **CIS**



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- A new study shows that consumers have a 45 percent higher recall of vanity 800/toll-free numbers than they do of Web URLs. It also illustrated that vanity 800 numbers are also more memorable than URLs when used in print, outdoor, and broadcast advertising formats. The research, sponsored by 800response (www.800response.com) suggest that marketers will conversely benefit from featuring memorable toll-free numbers in addition to listing a web addresses in their advertising campaigns. The majority of some 1,000 consumers surveyed cite "Research the Advertiser" and "Research the Competition" as their first steps when visiting an advertiser's Web site. An examination of multiple industries (auto, home improvement, education and health care) reveals that as many as 40 percent research an advertising company's competition as their first step once they move on from their Web site.

- Altitude Software's (www.altitude.com) Altitude uCI 7.5 has now been updated with new features that include an enhanced agent desktop, able to achieve higher first call resolution rates through the use of a built-in knowledge base and simpler routing management. A new business routing function provides a user-friendly interface for operational users to manage the multimedia routing visually, while providing contact center operations with enhanced intelligent call direction. Also, the Altitude Voice Portal 7.5 enables intelligent self service, for both inbound and outbound, leveraging speech recognition and text to speech capabilities, in addition to its established [VoiceXML](#) support.

- Confrimit (www.confrimit.com) has released Confrimit Horizons, the first fully on-demand, multi-channel (web, live agent, IVR, paper) platform for customer feedback, also known as enterprise feedback management or EFM, employee feedback, and market research applications. Key new elements include a module for reporting and analysis that enhances reporting productivity and increases opportunities for collaboration, and an 'analyst' role that enables users to perform ad hoc analysis for rapid sharing of information. There is also a hosted telephony service that provides on-demand telephone interviewing and which enables rapid call back to manage customers who report dissatisfaction.

- A new report by [Forrester Research](#) (www.forrester.com) offers several strategies that will help companies cut costs and at the same time boost revenues by improving customer service. The study, "The Economic Necessity Of Customer Service" by Natalie L. Petouhoff, Ph.D., Sharyn Leaver, and Andrew Magarie, also implore organizations not to shrink the quality of contact center-delivered customer care, and not to treat contact centers as cost centers. The net results are that firms will lose more than they gain: in higher operating costs, reduced revenue, brand equity, and market longevity.

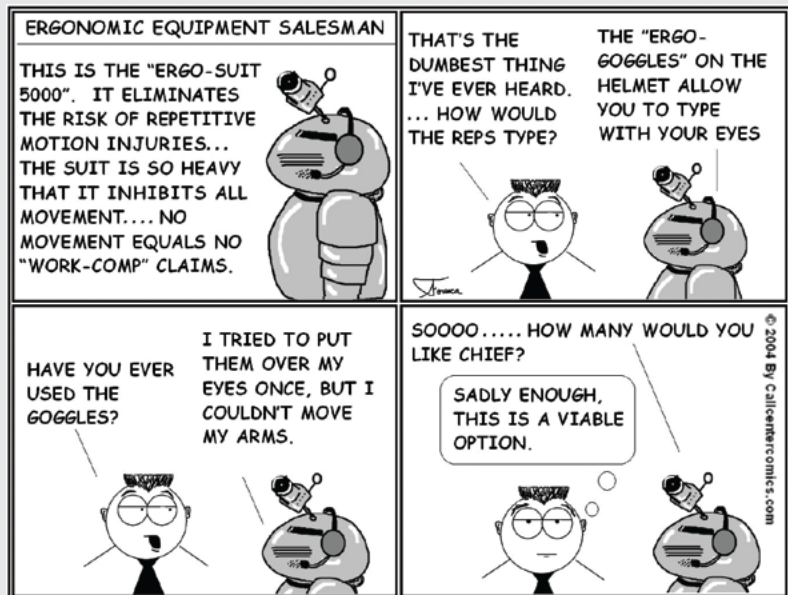
The strategies the report recommends includes customized proactive chat to prevent shopping cart and site abandonment, empowering sales agents with co-browse tools to assist customers, exploring deploying unified communications i.e. presence tools that connect agents to experts. It also strongly advises investing in creating and tapping into social networking communities and making self-service work in all channels to avoid abandonments and live agent zero outs.

- Interactive Intelligence (www.inin.com) will integrate the contact center and IP telephony capabilities of its Customer Interaction Center (CIC) software suite, with the unified communications and collaboration

functionality of the [IBM Lotus Sametime](#) software. The integration will include presence synchronization, company-wide directory, desktop client enhancements, and mobility features, all designed to improve communications capabilities between contact center agents and business users.

- [LiveVox](#) (www.livevox.com) now offers skills-based routing into LiveVox Hosted Dialer, enabling credit and collection organizations to match their best collectors with the highest value accounts. It also permits multilingual agents, who are typically used on inbound calls, to be blended into outbound programs, thereby increasing productivity. Hosted dialing gives a high degree of technical flexibility to outbound, whose volumes fluctuate program by program, thereby matching supply and costs with need. LiveVox is the only provider to integrate an ACD, which is required to deliver this feature, into a fully hosted dialing solution.

- Loyalty Lab (www.loyaltylab.com) has four new, lower priced products geared toward rapidly improving customer retention. Loyalty Lab CRM offers multiple data source consolidation, segmentation, and offer management. Loyalty Lab Reward provides card-based frequent shopper programs, rules-driven point programs, and benefits-driven recognition programs.





Loyalty Lab Clienteling allows retailers to manage customer relationships actively. It also gives front-line personnel have access to the latest customer information and relevant calls to action. Loyalty Lab Insight is a reporting and analysis solution for consumer-specific businesses. It provides deep insights into customer behavior over time by leveraging the data warehouse and matching algorithms used by the firm's CRM and loyalty marketing products.

- Tapping into social networks has become easier. Mercury Grove (www.mercurygrove.com) has gone live with Dex, its first social CRM tool. Dex allows firms to follow a better and efficient contact management system with focus on relationships, openness of information, and strong integration with websites and e-mail marketing programs. The company says that unlike

existing CRMs that are built on databases that require constant maintenance and updating, Dex is the reportedly the first "community-maintained" database, leveraging the Internet.

- Netop (www.netop.com) has launched Netop Live Communicator Suite 3.4, the latest version of its online collaboration and communications tools which offer solutions for desktop management, unified communications, conferencing, advanced training and instruction. It now allows participants to share multiple videos and applications from multiple sources. In addition, conference meeting leaders can use the solution to ask participants to work together in breakout sessions and then return to the main conference. Users can mix the audio sources during a Netop Live Communicator conference on the Communications Manager Server,

resulting in lower bandwidth consumption, enhanced quality of sound and support for more simultaneous participants.

- OrecX (www.orecx.com) debuted at ITEXPO East the OrecX VoIP Recording Appliance its first all-in-one, plug-and-play call recording solution. The product, which combines OrecX's Oreka TR Total Recorder application with a 1U, Linux-based rack-mounted server, can record up to 200 simultaneous VoIP sessions. The OrecX VoIP Recording Appliance gives small-to-medium businesses a smooth migration path for handling VoIP calls while providing total recording, live monitoring, rule-based selective and sampled recording, or record-on-demand options. The appliance integrates with any phone system and supports all major protocols. **CIS**

Salesforce.com's Service Cloud

Salesforce.com (www.salesforce.com) has lifted customer service, including technical support, literally to the next level, in the cloud. It has rolled in the Service Cloud: which combines live agent voice, e-mail, and chat customer interactions with social networks and communities and with hosted knowledge solutions to provide coherent, effective, and lower cost service and support.

Built on Salesforce's the Force.com platform, the Service Cloud brings together cloud computing platforms like [Google](http://Google.com), Facebook, and Amazon.com to capture every conversation and leverage every community expert within them. Force.com provides the necessary building blocks to quickly build and run business applications including database, workflow, logic, integration, customization, mobile, and user interface capabilities.

Contact center agents and support reps will use the Service Cloud as a community/social network informal presence tool by quickly reaching out to experts in these communities and sites that will be created, defined, and limited by their organizations. Through these connections, companies will be able to funnel this information directly into their knowledge bases. The Service Cloud ensures that they will have the most up to date support information sourced from community experts.

Key Features and Components

Salesforce.com's Service Cloud includes the following features and components:

- Presence capabilities for contact center agents, enabling them to seek and obtain assistance from available experts

- Tools to create an internal online active community within and adjacent to your organization, such as remote agents, suppliers, and partners

- Ability to reach out to community/social networks, ensuring that the quality of customer service is consistent across every channel. Organizations can define the size, scope, and members of their communities

- Hosted easily updatable knowledge bases within your firm or with password access your network

- Google search built-in

- Force.com development tool

System Requirements

Must be Salesforce.com customer

Pricing

The Service Cloud packages start at \$995 per month, which includes creating a customer community with unlimited usage for up to 250 customers and a contact center with up to five agents. It also permits a connecting with native cloud computing sites such as [Facebook](http://Facebook.com) and Google and inviting up to 5 partners to participate. **CIS**

Avaya's Video Assist

Avaya (www.avaya.com) Avaya Video Assist is an in-store, IP video-based customer service solution that can connect customers to off-site experts using video conferencing, and thereby help customers get specialized assistance on specific products. It delivers more in-depth product information or support than an on-site retail associate can deliver, or if in-store staff is not available to help a customer.

To use Avaya Video Assist, customers or shoppers visiting a store simply go to the Video Assist kiosk and while interacting with the kiosk, they can select the Live Help option from the touch screen. Avaya Video Assist will then connect with the off-site resource based on the kiosk location, the screen the customer is on in the kiosk application or any other criteria that is required to establish a 2-way video conference between the in-store shopper and the appropriate live off-site agent or resource. The agent can push instructions, video clips, photos or diagrams to the customer for reading and printing; they can even send a store map to direct a customer to a product's location and can also relay promotional information.

Key Features and Components

Avaya Video Assist includes the following features and components:

- Sales Floor: Avaya Video Manager, Avaya IP Softphone w/video, Virtual Network Computing (VNC) Server, Webcam, Microphone
- Video Assist Agent: Avaya Video Manager, VNC Client, Webcam
- Contact Center: Communications Manager with Call Center Elite/Advocate, Call Management System (CMS), Application Enablement Services, skills based routing, reporting, and recording. Agent-side functionalities including annotation capabilities, pushing contextual video to kiosk, sharing screens, and applications to kiosks via video or associated document window(s)

- User experience: easy to use multimodal experience for hold, mute, transfer functionalities, wideband audio to be provided to the kiosks (with physical phones)

- Video and application wait treatment: Interactive voice, video response for hold treatment, digital signage on kiosks

The physical device which Video Assist runs on to interact with the consumer could be a desktop computer, freestanding kiosk housing, or a flat panel wall mounted touchscreen.

System Requirements:

Avaya Communication Manager platforms and IP Softphone applications along with contact center applications including Avaya Call Center and Call Management System. Avaya Video Assist sits on top of Avaya Contact Center infrastructure but can plug into any kiosk or self service retail application or station. It can also use various webconferencing technologies such as Adobe Connect or VNC.

Pricing:

For implementation in a 50 store chain, approximately \$4,500 - \$8,000 per store or for a 250 store chain, approximately \$2,500 - \$4,000 depending on options and business process (es) implemented. This indicative pricing is exclusive of the kiosk form factor and assumes the necessary Avaya IP and contact center infrastructure is in place. **CIS**

Quite a few people have written to me in regards to **Multimedia Queuing (MMQ)**. They all wanted to know whether or not investing in the new "gotta have it" was worth it.

A **ZCC Unified Contact Center** provides your agents with a smart multimedia solution that can cope efficiently with large numbers of inbound inquiries by email, fax, web chat, or phone.

For example, your agents are delivered emails only as they are ready to deal with them. Agents who are logged out, on a break, or already dealing with calls, are not delivered emails until they become available. Once the email is delivered, if the agent takes too long to open the email, the Zeacom software pulls it back and puts it back into the **Email Queuing** mailbox.

Fax Queuing delivers directly to the appropriate agent so they can view and/or print the fax at their discretion.

With **Web Chat Queuing**, you can direct customer chat requests to specific individuals or departments that are best equipped to respond to them. And, did you ever think how great it would be if your contact center agents could 'show' a customer exactly which web page they are referring to during a chat session?" With Web Chat, agents have the ability to 'push' a URL directly to online customers, providing a significantly higher level of customer service.

Do you have a question for Andrea? Email marcom@zeacom.com



Andrea Kerr is an Engineer at Zeacom. For the past 8 years, she has deployed solutions for customers across the country.



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By Tim Searcy



Avoiding the Common Mistakes of a Downturn

The last several months have been the strangest in my career in teleservices. Members of mine are buoyant and excited about new work one minute, and on the precipice of failure due to corporate cutbacks the next. Everyone is waiting for the turnaround, but when asked, nobody knows for certain what the sign would be to tell us the recession is over. So the waiting continues, the fear increases, and decisions get made in haste. I think there are mistakes people make that you can avoid:

1. Cut investment – This strategy works if you had an ineffective investment plan to begin with. However, if the reason for increasing technology, securing more bandwidth or creating new training was sound before things got tough, it should be sound now. Now is the time to invest. At no other time will you find partners as willing to negotiate price and terms as during this downturn.
2. Give up on your strategy – This may be the biggest mistake of all. If your go to market strategy was based on your core competence and your effective sales message, keep it up. Strategy is to be created in the cold objective light of fact-based contemplation. A downturn in the market causes most people to assume that their plans were wrong. A better question might be, “What about my plan will work better in these tough times?”
3. Chop the marketing budget – A classic mistake that every business leader and guru has reminded executives not to make . . . and they do it anyway! Many companies that are ill-prepared for the downturn immediately assume they can ride out the storm with the customers they have. This is short-sighted and foolish thinking. Financial institutions, telecom providers, and other organs of growth have all curtailed spending in the hopes that they can save their way to prosperity. Even the government knows that the only way out of this crisis is to grow.
4. Automate everything – Everywhere I turn, companies are moving to automation instead of live operators. Although a good balance of solutions makes sense, there is no doubt that automation is cheaper. However, customer satisfaction studies indicate that human service tops the list of valuable means to demonstrate customer interest. Consider carefully the customer experience before you change the way you service your customers. This also goes for the offshore solution as well.
5. Fire the most expensive people – This is also popular right now. Many people in large companies like Disney, GE, Walmart and others have been offered the proverbial buy out package. These are lightly disguised efforts to take long time employees with substantial tenure and pension programs off of

the rolls. Additionally, these packages can shift to the balance sheet as one time costs and make income statements look better in the short run. The problem is that the most expensive people are the most knowledgeable. Be careful to keep enough talent around to run the contact center.

6. Cut training costs – This is one of those easy to consider and hard to recover from mistakes. Your first line call center representative is the most powerful tool in your war against customer attrition. For that reason, you have to keep your soldiers trained and mission ready. The only way to do that is to invest. Now many organizations have traditionally had high turnover in their contact centers, and therefore have not invested in training. With the economic downturn, your employees are less likely to leave, and therefore training will make more economic sense.

7. Do nothing risky – I really understand the need to be careful with scarce resources. However, the high-performance organizations will take risks in tough times. This does not mean you should run out and make decisions without proper consideration. But it does mean that you should make carefully placed bets which have the opportunity to elevate your performance or your ROI. A good rule of thumb is to put roughly 10% of your revenue at risk if a payoff of 50% or greater is possible. Once the risk has been deemed worthwhile, you can expand your efforts.

The best advice I can give you is to follow the triage recommendation that new doctors receive: listen, do no harm, and help. Although I have given this advice in this column in the past, I feel even stronger about this now. The industry is poised on the edge of a cliff, and not everyone is going to make it through this crisis. However, you need to lead and not wait. You need to challenge yourself, instead of hope. For companies seeking partners, new business opportunities, or more in-depth understanding of what is going on in the marketplace, please visit www.tmcnet.com, or contact me directly at tim@ataconnect.org. **CIS**

– Tim Searcy is CEO of the American Teleservices Association.



Introducing the Outbound Call Center Online Community

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

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Customer Interaction Solutions Magazine's 24th Annual Top 50 Outbound Teleservices Agency Ranking

This is the twenty-fourth year Customer Interaction Solutions magazine brings you its "Top 50" Teleservices Agency Ranking. In this issue, we're presenting the "Top 50" outbound portion of the ranking. (The inbound ranking will be highlighted in the April 2009 issue.) Since its inception in 1986, our "Top 50" ranking has been used as the benchmark for choosing large-capacity/sized teleservices agencies.



Ranking Basis

Since the basis of our ranking is company size, Customer Interaction Solutions uses a measurable, third-party-verifiable aspect of teleservices to arrive at our list of the "Top 50" agencies: the number of minutes each agency was billed by each of its phone companies for telephone service for 12 months, encompassing November 2007 through October 2008.

Qualification Criteria

To qualify for inclusion in this year's "Top 50," the agencies were required to answer a questionnaire detailing the nature of their business and listing their number of billable minutes between November 2007 and October 2008. The questionnaire had to be verified with the signature of each agency's president/CEO. In addition, each agency had to submit a letter of verification from each of its telephone service providers certifying the number of minutes for which it billed the agency during the designated period.

Exceptions

Agencies that did not supply this third-party verification were disqualified, with the exception of three circumstances: 1) a client of the service agency was billed directly for its telephone service and would not provide a letter of

verification for anonymity reasons; 2) part of the billable minutes were with a foreign telecommunications carrier that could not provide the data by the deadline; 3) legitimate business situations prevented an agency from obtaining verification from certain of its carriers or a certain carrier. For these circumstances, we allow the company to certify a portion of the missing minutes with a letter of explanation and signed verification of billable minutes pertaining to the explanation from the president/CEO of the agency. You will find an asterisk (*) next to the name of all agencies that supplied a portion of their verification from their president/CEO.

Understanding The Listings

As you read through the list of outbound "Top 50" agencies, you will notice that we have provided a numerical ranking of 1 through 32 (1 being the largest), as this year, only 32 companies met with our minimum criteria of billable minutes to be included in the outbound ranking.

Category A is composed of U.S. service agencies, and Category B consists of international teleservices agencies. Again this year we have separated out all international teleservices done by U.S. agencies and ranked those companies' international minutes in the International category, Category B. Domestic companies that are also ranked in the International category are marked with a dagger (†) in their domestic ranking. **CIS**



Category A

1. Millennium Teleservices LLC

(Edison, NJ) †
www.mmtel.com

2. Teleperformance USA

(Salt Lake City, UT) †
www.teleperformance.com

3. GC Services Limited Partnership

(Houston, TX) *
www.gcserv.com

4. ACS Inc.

(Dallas, TX) * †
www.acs-inc.com

5. Americall Group, Inc., a Teleperformance Company †

(Naperville, IL)
www.americallgroup.com

6. DialAmerica

(Mahwah, NJ) *
www.dialamerica.com

7. Influent

(Dublin, OH) * †
www.influentinc.com

8. TCIM Services, Inc.

(Wilmington, DE) * †
www.tcim.com

9. Charlton

(Madison, WI)
www.tgcorp.net

10. Teleservices Direct

(Indianapolis, IN)
www.teleservicesdirect.com

11. Cross Country Automotive Services

(Medford, MA) †
www.crosscountry-auto.com

12. Synergy Solutions, Inc.

(Scottsdale, AZ) *
www.synergysolutionsinc.com

13. OKS Ameridial

(North Canton, OH)
www.oksameridial.com

14. Telvista, Inc.

(Dallas, TX)
www.telvista.com

15. American Customer Care, Inc.

(Bristol, CT)
www.americancustomercare.com

16. AnswerNet

(Willow Grove, PA) *
www.answer.netnetwork.com

17. eTelecare Global Solutions

(Scottsdale, AZ) * †
www.etelecare.com

18. RDI Marketing Services

(Cincinnati, OH) *
www.rdimarketing.com

19. Hamilton Contact Center Services

(Aurora, NE)
www.hamiltontm.com

20. Thomas L. Cardella & Associates

(Cedar Rapids, IA) *
www.tlcassociates.com

21. NCO Customer Management

(Horsham, PA) * †
www.ncogroup.com

22. 121 Direct Response

(Philadelphia, PA)
www.121directresponse.com

23. Greene, an RMG Direct Company

(Lincolnshire, IL)
www.rmgdirectinc.com

24. Power Direct

(Cleveland, OH)
www.power-direct.com

25. TMS Health

(Boca Raton, FL)
www.tmchealth.com

26. APAC Customer Services, Inc.

(Bannockburn, IL) *
www.apaccustomerservices.com

27. The Connection

(Burnsville, MN) *
www.the-connection.com

28. InService America

(Forest, VA)
www.inserviceamerica.com

29. Telerx

(Horsham, PA) *
www.telerx.com

30. Affina

(Peoria, IL) *
www.affina.com

31. O'Curran, Inc.

(Draper, VT)
www.ocurran.com

32. Alta Resources

(Neenah, WI) *
www.altaresources.com

3. NCO Customer Management

(Horsham, PA) *
www.ncogroup.com

4. eTelecare Global Solutions

(Scottsdale, AZ) *
www.etelecare.com

5. ACS Inc.

(Dallas, TX) *
www.acs-inc.com

6. Influent

(Dublin, OH) *
www.influentinc.com

7. Americall Group, Inc., a TelePerformance Company

(Naperville, IL)
www.americallgroup.com

8. Voxdata

(Toronto, ON)
www.voxdata.com

9. IMC Teleperformance

(Seoul, KR)
www.imctp.co.kr

10. Cross Country Automotive Services

(Medford, MA)
www.crosscountry-auto.com

11. Millennium Teleservices LLC

(Edison, NJ)
www.mmtel.com

12. TCIM Services, Inc.

(Wilmington, DE) *
www.tcim.com

13. 24-7 Intouch

(Regina, SK)
www.24-7intouch.com

Category B — INTERNATIONAL

1. Teleperformance Group

(Paris, France)
www.teleperformance.com

2. Teleperformance USA a TelePerformance Company

(Salt Lake City, UT)
www.teleperformance.com

Learn From IBM: Add Services

In his **Communications and Technology Blog**, Rich Tehrani writes:

IBM has shown us that services are a great way to keep your revenue stable or even growing in a slowdown. When companies slash jobs they still need to get work done and this is where companies with strong service arms come in. Those with services revenue will outperform those without it.

Here is an excerpt from an article on **IBM's** earnings in a Hudson Valley newspaper:

In 2008, 40 percent of IBM's profit came from software, 42 percent from services and just 9 percent from hardware.

In the fourth quarter, IBM's consulting arms reported new services signings of \$17.2 billion, with 24 deals greater than \$100 million. IBM's services backlog at Dec. 31 was \$117 billion.

Revenue in Global Technology Services was down 3.7 percent to \$9.6 billion from \$9.9 billion a year ago. Global Business Services revenue was down 4.5 percent to \$4.7 billion from \$4.9 billion a year ago.

The \$117 billion shows tech and tech services are somewhat resistant to the current economic environment.

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

Must The Media Get Involved To Ensure Quality Customer Service?

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

Canada's Toronto Star newspaper ran an excellent article by its consumer affairs columnist, Ellen Roseman, on several firms that have responded well when faced with consumer complaints or incidents. These companies are Molson, Staples, GM, and Future Shop.

"I'm not looking for thanks when I send consumer complaints to large companies," she wrote. "But I'm always impressed when they respond with gratitude. Smart companies know it's cheaper to retain customers than to find new ones. Each complaint I send gives them a chance to head off defectors and turn their anger into applause."

It is commendable that these outfits acted promptly and effectively. Yet the cases she cited was where people were treated with respect "once the media got involved." The question that lingers is that why does it have to take the media to get involved for companies to do the right thing? Why can't otherwise intelligent firms put in place solid procedures to resolve the issues in the first place that is far cheaper and less image-damaging than getting the press involved, and forking over cash in PR expenses?

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

ContactQ Enhances Asterisk's Call Center Functionality

In his **VoIP & Gadgets** blog TMC CTO Tom Keating writes:

ContactQ is a new call center application server created by Braxtel Communications that brings advanced call center functionality to the **Asterisk** platform. Their aim is to handle any sort of contact method and put it into their advanced multi-media queue. For instance, they plan on queuing video calls, text messages, web callbacks, and of course regular calls.

ContactQ is a fully featured multi-media skills-based routing ACD. They use their own front-end interface for configuration as well as monitoring of call

center queues and call center statistics. Importantly, ContactQ sports the ability for call center supervisors to listen in on agents using DTMF/touch tones on their phone. Features include a powerful IVR with drag and drop programming tool and historical reporting delivered via the web browser and powerful dialing capabilities critical to call centers, including Outbound Preview, Progressive and Predictive dialing modes.

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

DataForceCRM Guarantee

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

DataForceCRM, which makes sales lead management software and CRM software, is coming out with a promotion guaranteeing results or "customers get money back, no questions asked," company officials say.

"CRM users have struggled with low return on high per user costs," according to DataForceCRM officials, who add that in their view, "a great product, offered for a fair price, will add value and win market share."

Hard to argue with that logic. Company officials say most online CRM is priced at \$65 per user per month or higher these days - "and the buyer of CRM often needs other modules that jack the cost even higher." DataForceCRM is

offering Enterprise CRM for ten bucks per user per month, guaranteeing results "or your money back."

Each client is set up a dedicated server for flexibility, security and performance, company officials say, adding that campaign creation and tracking are provided "to make sure marketing spend is invested wisely. Rich e-mail and mail merge features are provided" as well.

There are Lead and Opportunity Management modules, and the Customer Support feature includes trouble ticket tracking and a customer portal in the user pricing. There's also order management.

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



Study Shows Companies Need New Strategic Metrics

The performance of the contact center can make the difference between retaining the customer base and driving up costs in an attempt to replace lost customers. As a result, contact center managers are often capturing performance variables and measuring against established criteria.

A new survey on performance management released by [Genesys Telecommunications Laboratories](#) indicates that businesses need a new set of strategic metrics to retain customers and drive sales. The research determined that UK firms are more likely to adopt strategic metrics than other regions to better assess customer service delivery and retention, yet there is still work to be done.

Contact center managers tend to use traditional metrics, including call duration or average speed to answer, to assess the customer experience. Unfortunately, only 30 percent of contact centers actually measure revenue per call, which could in fact provide more useful customer intelligence.

Nearly one third of UK businesses surveyed are currently taking actions to address performance management and reporting in the next 18 months. These contact centers have also implemented proactive business management strategies to enhance end-to-end customer interactions.

The Genesys report said that a much higher proportion of UK businesses (55 per cent) track customer expectations compared to only 48 per cent in other regions. Over 28 per cent of companies in the UK are planning to link business drivers with customer behaviors.

The research also found many businesses still do not measure revenue from customer care

interactions. While 77 percent of UK respondents reported that the contact center plays a role in revenue generation, only 33 percent of customer service professionals and 28 percent of C-level executives said that their customer service is measured on revenue per call.

“A downturn can be an opportunity for an organization to gain a competitive advantage. Some companies will certainly have to close their doors, but those with more focused efficiency strategies, meaningful employee performance measurements and customer-related targets, have the potential to thrive in the current climate,” commented Keith Pearce, Marketing Director, EMEA, at Genesys. **CIS**

Best-in-Class Companies Optimize Marketing Across Multiple Channels

As contact centers play an important role in the marketing efforts of a company, many struggle to optimize online and offline marketing campaigns across a number of new marketing channels. [Aberdeen](#) has published a new study that examines the efforts of Best-in-Class companies.

In executing their marketing efforts, companies tend to keep silos of information in separate channel-centric technologies. When combined with distributed marketing efforts, the organization discovers increased challenges to managing multichannel marketing efforts.

The contact center is playing a key role in these marketing efforts, but as more sales and marketing channels continue to emerge, multichannel campaign performance is becoming increasingly difficult to track and monitor.

Aberdeen discovered in its study that Best-in-Class companies are 1.5 times more likely to address these challenges by utilizing next-generation solutions that enable cross-channel optimization across an enterprise.

Aberdeen's report found that top performing companies currently execute multichannel campaigns to extract maximum value from their marketing investments. When companies combine organizational capabilities and marketing technologies, top performing companies can positively impact the return on marketing investments and customer profitability.

“Traditional multichannel marketing is largely a function of delivering multiple separate campaigns across multiple channels,” explained Ian Michiels, Research Director at Aberdeen. “Best-in-Class companies are executing structured, collaborative cross-channel campaigns, and they are deriving extraordinary results from these tactics.”

“The challenge of executing, measuring, and optimizing multichannel marketing has far reaching implications that affect marketing performance, measurement, and customer retention and acquisition,” Michiels added.

The contact center operation is critical in the retention of the customer base. The center cannot effectively do its job if contact center agents are consistently struggling between disparate systems to gather customer information.

It is important for the organization to leverage each and every customer interaction to capture information and plug it back into internal business intelligence to maximize offerings for clients. In addition, contact center agents are better equipped to serve the base and upsell where opportunities arise. **CIS**

Telemarketing Rules, Enforcement, Issues, and Taxes



On most desks there are usually several items that merit attention, and The Compliance Desk is no different. Here are those matters that are on the top for this issue:

September 1, 2009: What's Your Gameplan?

Last year the Federal Trade Commission (FTC) adopted amendments to the Telemarketing Sales Rule that rolls out a series of restrictions to pre-recorded sales calls. As of December 1, 2008, prerecorded sales calls must provide an easy opt-out feature. More significantly, beginning September 1, 2009, automated sales communications can be delivered only to those recipients who have provided their "express written consent" to receive them; having an existing business relationship (EBR) will no longer suffice.

Mark Friedman, chief marketing and business development officer at Sound-Bite Communications, has looked at this issue. He offers advice on how organizations can prepare for the next phase and act quickly to maximize the percentage of consumers that they will be able to cost-effectively reach via automated calls to sell their goods and services:

The FTC Telemarketing amendment is a unique opportunity for organizations because it combines both critical and strategic issues: the urgency of a time deadline (i.e. they must obtain permission by September 1, 2009) and a strategic opportunity that can impact long term success by enabling more targeted, effective marketing. The FTC's amended TSR rule is a game changer. Organizations need to act quickly to maximize the percentage of consumers that they will be able to cost-effectively reach via automated calls to sell their goods and services.

Customer Communications and Brand Loyalty

Companies establish a brand impression with their customers – the better and stronger the brand impression, generally the more profitable the relationship for the organization. Customer communications plays a major role in forming

that brand impression. Yet how many organizations really know how each of its customers prefers to be communicated with? And under what circumstances?

For example, if you are running a special sale on an item they might be interested in purchasing – would they prefer to find out via an email? Voice message? Text message? Direct mail? Some combination? What if you wanted to make a special offer to members of your loyalty/reward program – how would your customers want to hear about this offer?

Each consumer has his/her own communication preferences. Some want to receive e-mails, others voice messages, others text messages, and others would prefer to be called on their cell phones. And many would prefer to receive communications through a combination of channels. It is important to ask consumers directly how they want to be communicated with so that you can develop a communication strategy that encompasses their preferences.

Communications are all about getting consumers to act. And here's the point: if you know in advance what their preferences are, you will be in a much better position to have your communications "breakthrough" and be acted upon. This will mean more market share, more revenue, more profit.

As an organization determines the individual communication preferences of its consumers, it can then secure express written consent from these consumers (i.e. their permission.) As a result, organizations will be well positioned to deliver relevant information to consumers who have expressed an interest in their goods or services.

The Opportunity Is Now

Seize this opportunity and create a formal Consumer Communication Preference and Opt-in Program. The requirement to gain permission by September 1, 2009 creates an urgency to do so. The value of understand-

ing consumer preferences should create a strategic drive to do so.

Here are some questions organizations should be asking:

- Do you have contact information for your customers and prospects?
- Is this contact information complete and updated – for mobile phones? E-mails? Landlines?
- How do you keep contact information updated?
- Do you understand your consumers' communications preferences?
- Text Messages? E-mail? Voice Messages? Direct Mail? Live Agents?
- Do your consumers' communications preferences vary by the situation? Service Reminder vs. Special Sale Offering vs. Loyalty Program Update vs. Fraud Notification?
- How do you track and update your consumers' evolving communications preferences?
- Can your entire organization access your consumers' communications preferences?
- What's your organization's plan to handle the September 1, 2009 Telemarketing rule changes?

Those that act swiftly and with purpose in creating a formal Customer Communication Preference and Opt-In Program will have a head start in building a targeted, qualified list of customers who want to hear from you and will welcome your communications. After all, it's all about customer choice, so why not deliver your communications to those who want to receive them- how they want to receive them.

Do Not Call: U.S. Cracks Down on Violators, Canada's Registry Abused by Fraudsters

The U.S. and Canada have had a slew of positive and negative experiences recently in their Do Not Call (DNC) registries.

- The FTC forced two groups of vacations and timeshare companies to pay fines of almost \$1.2 million for violating the DNC rule

Court orders entered by a federal district court settled the FTC's charges against the defendants. They are Central Florida Investments, Inc., Westgate Resorts, Ltd., and CFI Sales & Marketing, LLC (collectively, the Westgate defendants); and against All In One Vacation Club, LLC, Accumen Management Services, Inc., and their principals (collectively, the All In One Vacation Club defendants).

The cases, filed by the Department of Justice on behalf of the FTC, alleged that these firms called consumers whose phone numbers were on the federal DNC registry without having obtained their express written agreement or having an "established business relationship" with them. One group's telemarketers also allegedly abandoned many calls, by failing to connect the calls to a sales representative within two seconds after consumers answered, as required by law.

The FTC contends that, in both the Westgate and All In One Vacation Club cases, consumers did not reach out to the defendants seeking information about their products or services before receiving a telemarketing call. Thus, the companies did not have an 'established business relationship' with the consumers. Moreover, consumers had not given the defendants permission to call.

- In Canada, the country's new DNC registry appears to be open to similar abuses, and may very well be headed to some changes

The Globe and Mail newspaper reported that the Consumers' Association of Canada says it has been inundated with complaints from people who have been called by scam artists after placing their phone numbers on the registry. The Canadian Radio-television and Telecommunications Commission (CRTC), the country's communications regulator, sells the list online for a fee to marketers to scrub those numbers off their databases.

The CAC says people didn't understand what they were getting into when they

signed onto the DNC and gave out their phone numbers. These are now in the hands of all sorts of what it calls 'pirates' that consumers never knew existed.

"You can buy any list you want of people who subscribe to the do-not-call registry online," CAC president Bruce Cran told the newspaper. "The whole of Toronto costs you 50 bucks for 600,000 names. That's just perfect for any telemarketer, because these are good names which they would otherwise have to pay money for to verify. In addition to that, there's no index list of cell phone numbers that you can get. However, people were encouraged to put their cell phone numbers on there as well."

Penalties for list misuse run as high as \$15,000 for a corporation or \$1,500 for an individual. Yet enforcement is challenging because the paper says it is difficult to fine fraudsters based in or outside of Canada.

The issue prompted the opposition New Democratic Party Member of Parliament (MP) critic for consumer affairs, Glenn Thibault, to ask the federal Privacy Commissioner Jennifer Stoddart if making the phone numbers on the registry available is a violation of the country's privacy laws.

"We have received a copy of [Mr. Thibault's] letter and we are just gathering information at this stage," the commissioner's spokesperson, Valerie Lawton, told the newspaper. "But we were aware of this issue before and we have discussed it with the CRTC. We have been in contact with them and understand that they are looking at it. They are taking it seriously."

The CRTC is investigating the issue but it could not give any timelines.

"We are aware of the situation and we are trying to assess how to respond," said commission spokesperson Denis Carmel.

The MP said he has received numerous calls from people who believe they have been called by telemarketers who obtained their phone numbers from the do-not-call registry.

"We've all heard these stories where someone gets taken advantage of," said Thibault. "And if this does happen because we've forgotten to cross an 'i' or dot a 't' then shame on us. We're putting this in place to help, not to make it worse."

ATA Washington Summit

To get the inside track on government legislation and regulations consider attending the American Teleservices Association's Washington Summit, subheaded 'Regulation is a Reality' which will be held April 26-29 2009.

This may be one of the most critical meetings to attend, what with the new Administration and Congress. There have already been moves to enact protectionist and more restrictive legislation amidst efforts to kick-start the economy with stimulus packages.

The ATA identified several issues on the horizon such as crippling wage escalations, workforce unionization, demise of upsell/cross-sell, mandatory opt-out legislation, and penalties for offshoring.

The Summit highlights include expert presenters who will give perspectives on the 2009 economic and political landscape, federal and state regulatory updates, luncheon roundtables, more on the ATA's Self-Regulatory Organization, and the ATA-PAC fundraiser. **CIS**

Tax Change for Independent Home-Based Agents

April is tax time and there are a few changes in the U.S. for self-employed individuals such as independent home-based contact center agents.

The Internal Revenue Service (www.irs.gov) says that more self-employed people can choose the optional methods for figuring and paying the self-employment (SE) tax. These optional methods allow those with net losses or small amounts of business income a way to obtain up to four credits of Social Security coverage. The income thresholds are increased for 2008 and indexed for inflation in future years.

Caution: those who choose an optional method may see their SE taxes increase but this may also qualify them for the earned income tax credit, additional child tax credit, child and dependent care credit or self-employed health insurance deduction. Schedule SE and its instructions have details.



CRM: Complex Needs, Challenging Responses

Customers are empowered and demanding that their needs be met the way they want, over a growing array of channels from anywhere they choose, at low cost, no hassle, and now. They are relying less on branding and companies for product information and recommendations and more on their peers. One size, one single view of customers, when it comes to service, no longer fits all.

At the same time more companies, and contact centers, are becoming demanding, and empowered when it comes to deciding on solutions to meet their needs. A growing focus on customer retention at the C-level has meant that more corporate players are involved, and who want results. There is declining tolerance for solutions that take months if not years to reap the returns from.

These trends are prompting shifts in customer relationship management (CRM) participants, strategy, deployment, and technology. Fading are the days when CRM meant cutting sales, contact center, or help desk costs and buying a do-everything package and painstakingly integrating each complicated module, some of which may not get used, over many months or years and waiting for ROI.

Dimension Data's Global Contact Centre Benchmarking Report says the biggest driver behind CRM is the need to have it available across the enterprise, and for it to generate ROI. CRM is no longer for sales or marketing or the contact center.

"Organizations have been disappointed in the past at the lack of clear ROI from CRM, mainly because it has been siloed to sales or marketing," explains Paul Scott, Solutions Director Merchants Group, a Dimension Data Company. "Nowadays CRM is about sharing data across departmental boundaries and realizing significant savings and revenue growth opportunities. If someone in marketing can spot an upsell trend in data they get back from the contact center, they can formulate a campaign and execute this with sales seamlessly,

provided everyone is using the same core CRM system."

Isher Kaila, an analyst covering global CRM strategy and implementations with [Gartner](#), is seeing more companies use a phased approach to buying and implementing CRM solutions. They purchase separate applications or modules to meet specific needs, such as contact center agent software, IVR or a help desk management system. Most projects average between four to nine months per major phase. In contrast CRM projects can take up to 12-18 months to go live with.

"Enterprises are under increasing pressure to provide tangible ROI within the first 120 days of a CRM solution being available," explains Kaila. "The phased approach enables firms reap the benefits of CRM far quicker than if they bought suites and didn't use much of the functionality of those products."

CRM Supplier Responsiveness

Enterprise-scaled CRM solutions suppliers are adapting to help their customers meet these needs. CRM is becoming more flexible and truly multichannel: an a la carte or day menu rather than a huge, complete, and sometimes indigestible meal. The tools are now being designed to interface with e-mail, chat, and SMS, and to tap into social networks as well as connecting into inbound and outbound voice transactions, and to be accessed over mobile devices.

More products are now being delivered off-premises or 'on demand' as software as a service (SaaS), multi-tenancy, private host-



ing, and hosting of traditional on-premise solutions. These methods offer lower up-front costs, greater flexibility, and shorter go-live times compared with premises delivery (this topic will be covered in-depth in the August issue). Yet they face some challenges in being widely applied for contact center customer service, sales, and support functionality at the enterprise level.

Bernard Drost, Chief Technology Officer at [Innoveer](#) Solutions explains that it takes longer to launch an on-demand application when there are inbound and outbound contact center applications involved as compared with sales force automation or help desk applications. That is because there is greater complexity with them and more is integration needed, such as with routing and home-based agents.

Also there are more potential security issues with SaaS. While the data is encrypted, their multitenant environments make it challenging to use virtual private networks, which is a popular tool to enable more secure data access through corporate firewalls. Yet such matters are gradually being addressed as suppliers, consultants, and their clients examine, create, test, modify and deploy solutions.

"We are still in the beginning of the SaaS technology," explains Drost. "It has had a great ride but phishing scams and even penetrations into the SaaS applications will become more frequent, and news of credit card name and address breaches will become known. When other applications, like a PBX or knowledge bases are involved, additional connections to applica-



tions need to be built and secured.”

Meanwhile proprietary solutions are now more easily integrated with those of other vendors, aided by movements towards open source software, and service-oriented-architecture. Vendors are also including new tools that allow users to configure and change processes and workflows without involving the IT department or outside system integrators. That saves time, money, and gives them more control.

“The very old concept was ‘make the business process fit to the technology,’” explains Kaila. “Now it is not so much that as ‘here is our end-to-end customer business process, what opportunities do we have to streamline and optimize this before we think of anything else and what are the right solutions for it.’”

The changing CRM marketplace

The larger CRM vendors are now consolidating their gains, refining market focuses, and rolling out new and best of breed solutions following a series of mergers and acquisitions over the past few years. The moves also set up them for future purchases down the road.

Campus Management, which acquired Talisma CRM from nGenera last fall, plans to grow Talisma’s presence in its present banking, technology, travel and other key sectors in the Asian and European markets. It is also seeking new customers in the education, healthcare, nonprofit, pharmaceuticals, and retail fields.

Consona, which bought KNOVA and Onyx, has developed its offerings into a series of bundles including Consona Customer Management, Consona Knowledge Management, Consona Knowledge Driven Support, Consona Sales Force, and Consona OneServe Citizen Management. The firm says the new branding also leaves room for the company to continue its aggressive acquisition strategy within the CRM software space.

“Many companies are implementing their CRM solutions in pieces in order to alleviate specific departmental pains.”

explains [Consona](#) CRM general manager Tom Millay. “We want to provide a flexible product offering to accommodate a more phased approach to managing the customer experience, while still providing the benefits of enterprise-wide integration as functionality or departments are added.”

Pushing this trend along is that more demanding customers amidst a weak economy are putting increased financial pressure on suppliers. The net result may be more deals that will lead to a constellation of a few big companies surrounded by many niche players too small to be drawn into their maw.

“CRM software vendors are coming under increased pressure by their customers to innovate, such as in hot areas like social networking to provide a compelling reason for their buyers to invest in their products,” explains Kaila. “Yet many especially the small/mid-sized companies do not have the resources. Mergers may be the only way out for them.”

Other changes continue to roil the vendor landscape. William Band, who is Vice President and Principal Analyst with Forrester Research reports that midmarket-focused firms such as RightNow Technologies and Salesforce.com are moving into the enterprise space via their SaaS offerings. At the same time Microsoft is trying to exploit what he calls ‘its desktop applications hegemony advantage’ in large enterprises and promote its now-more-robust business applications to this sector.

Growing interest by customers in SaaS delivery and competition from pure-play vendors have led traditional CRM vendors have responded with their own offerings. Band cites [Oracle](#) On Demand and Microsoft Dynamics CRM Online solutions. Also Sage Software offers SageCRM as both an on-premise and SaaS solution; [SugarCRM](#) now offers a SaaS version of its open-source solution development model.

Meanwhile CRM vendors are moving aggressively to promote mobile sales solutions as extensions of their applications. Cross-market solution providers like [Microsoft](#), Oracle, salesforce.com, and SAP offer solu-

tions that can be used on handhelds as part of their CRM offerings. Yet Band says sales and IT leaders still are still perplexed by the complexities of the vastly different mobile sales options and architectures.

“CRM professionals will be particularly challenged to make the right CRM solution investment and/or application upgrade decisions during a period when every budget dollar will be closely scrutinized,” explains Band. “They will have to plot a course through a thicket of solutions that has become more difficult to navigate.”

More Versatility and Features

CRM solutions vendors are responding to changing enterprise needs by making their products more versatile and efficient. Some of their offerings are also targeted to specific markets.

Oracle’s Siebel CRM 8.1.1 provides industry-specific customer self-service for communications and for the public sector, as well as enhanced use of multi-channel applications with Siebel Chat and deeper, more comprehensive search capability. It also supports the entire customer loyalty program lifecycle by providing membership enrollment and management including loyalty points program accrual and redemption, member services, partner management and promotion management.

Sword Ciboodle’s platform has been optimized to enable faster deployment and customization, greater ease of use, and reduced bandwidth requirements. It also has new multi-language localization capabilities to permit greater outreach to worldwide and domestic multicultural markets.

Netsuite’s NetsuiteCRM has improved workflows for marketing and customer service. A two-step assisted workflow for group creation allows marketers to easily segment and slice their target audience for focused campaign execution.

A keyword search workflow is built directly into the user interface for case management to optimize the speed



with which contact center agents can search for and find relevant content from the knowledge store to respond to a customer service inquiry. Agents can now add content for inclusion in the central knowledge store with one click from information already entered on the case for the response to customers, which greatly increases the efficiency of case handling and helps to build the wealth of knowledge for re-use.

CRM solutions configurability is becoming easier. KANA is developing a next-generation customer service solution with IBM, called Service Experience Management (SEM) that enables companies to configure KANA's CRM solutions without involving web designers and IT staff. SEM is built on top of a SOA (service-oriented architecture) framework and SOA orchestration.

Customers are relying more on decisioning tools in their business planning, such as of what happens when they change pricepoints or availability on product/service demand, and on contact center volumes and costs. This enables them to help automate how best to respond to or resolve customer issues, most notably during contact center interactions. Based on historical customer interactions and other data points, a decisioning engine can provide the next-best action recommendation for contact center agents to take with customers.

Chordiant Software has developed a powerful new tool, the Chordiant Cx Visual Business Director (CxVBD) that enables enterprises to model and test customer interaction strategies while minimizing the risks, and costs, in live implementation. Utilizing a highly intuitive 3D interface, the CxVBD can test the impact of customer experience strategies on the bottom line enterprise-wide or in any part of

the business. With this information firms can assess, modify, or take back to the drawing boards even the most complex multi-channel, multi-issue, inbound and outbound programs.

CRM solutions can help fully utilize the Internet as a marketing tool. Microsoft Dynamics CRM Online permits firms to create and manage search engine campaigns, research and bid on key words using search engine optimization, and capture sales leads from the Web. The solution can unify search engine intelligence with CRM analytics to optimize campaign performance. It can provide insight into marketing return on investment according to click-through and conversion rates.

Salesforce.com's latest edition allows customers to extend Salesforce CRM applications through the creation of interactive Web-to-lead forms, which will enable site visitors to signal interest in products and services via a Web site. Force.com sites will also enable the quick and easy creation of campaign landing pages integrated directly with Salesforce CRM.

One of the newest needs is how to tap into social networks to learn more about their customers so that they can

more accurately predict their buying behavior and refine their lifetime values. Some CRM vendors are looking at ways of integrating to Facebook and LinkedIn to leverage customer insight and provide sales opportunity management functionality.

SugarCRM has been rolling out 'Cloud Connectors' that enable business information services and networking sites to connect into the firm's commercial open source CRM solution. There are at presstime Cloud Connectors for CrunchBase, Hoover's, Jigsaw, and LinkedIn. SugarCRM Cloud Connectors connect via Web Services to leading third-party data service providers so that users can obtain the most up-to-date account and lead information directly within SugarCRM.

"For example, an existing client may change jobs or roles, which potentially affects their buying authority and needs but the enterprise CRM system may not capture for weeks if not months," explains Kaila. "Yet this information may be available on LinkedIn or other third-party social networking websites and would provide salespeople with crucial information to follow-up with their customer." **CIS**

The following companies participated in the preparation of this article:

Chordiant
www.chordiant.com

Consona
www.consona.com

Innoveer
www.innoveer.com

Microsoft (Microsoft Dynamics)
www.microsoft.com/dynamics

Netsuite
www.netsuite.com

Oracle
www.oracle.com

RightNow Technologies
www.rightnow.com

Sage Software
www.sagecrm.com

Salesforce.com
www.salesforce.com

SugarCRM
www.sugarcrm.com

Sword Ciboodle
www.sword-ciboodle.com

Talisma
www.talisma.com

Communications-Based Process Automation (CBPA)



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

As the economy has slowed down, companies have focused on cutting expenses, increasing efficiency, and maintaining quality. To achieve this, many companies are investigating ways to automate processes. To find out more about the choices businesses have, I consulted Gina Clarkin, Product Manager with Interactive Intelligence, Inc. Their new product, Interaction Process Automation (IPA), demonstrates a fresh look at the way businesses can automate business processes.

Q: Can you give us a quick overview of Business Process Management (BPM)?

Gina: If you think about business processes, you quickly realize that they are the lifeblood of every organization. A business process is a set of activities or “work” an organization performs, designed to create value for the customer that enables the organization to achieve its objectives. Our CEO says, “Processes make organizations tick.” BPM emerged in the 1990s as an approach companies can employ to evaluate and improve their processes. BPM focuses on how work gets done. BPM looks at the processes, people, technology, management, and even the organization’s culture.

Q: One of the problems with traditional BPM is that existing solutions often involve a high degree of cost, complexity and customization. How is Communications-Based Process Automation (CBPA) making the BPM process faster and less expensive?

Gina: CBPA takes a different approach. Unlike traditional BPM solutions, CBPA has not evolved from an application development environment. CBPA has grown from the proven technologies and techniques of the contact center industry, an industry that has developed systematized processes to handle millions of interaction and transaction flows with great sophistication... an industry that optimizes people, technology and processes to serve the customer.

With CBPA, the all-in-one IP communications system becomes the process automation platform for the company. Instead of creating a dependency on complex programming, application development and customization, CBPA offers organizations a single system capable of providing everything needed to easily automate just about any common process.

Q: How does CBPA compare to Communications-Enabled Business Process (CEBP)?

Gina: CEBP could be characterized as evolutionary, an incremental improvement. It’s about embedding communications capabilities in existing applications or processes, enabling those applications or processes to automatically trigger a communication or notification based on a change in the business environment. For example, a customer’s database record indicates a balance due greater than a defined threshold. CEBP can generate a phone call using presence to connect to available personnel. CEBP is predominantly focused on communications events, not managing the overall business process.

In contrast, CBPA is revolutionary. CBPA focuses on how we automate processes in the first place. CBPA uses proven communications technology and management practices that have been in use for decades in the contact center (queuing, skills — based routing, presence, recording, real — time supervision) then applies these advanced technologies to process automation. For example, an insurance company could queue up insurance applications for the next available Processor, with the appropriate state license. The Processor receives a form “popped” on the screen and pre-filled with the correct information from the relevant back-office system. Alerts notify the processor and manager of approaching deadlines, so that work can be automatically re-assigned if necessary to ensure service levels are met.

Q: What other specific advantages does CBPA offer compared to other methods?

Gina: Since CBPA relies on the power of an all-in-one IP communications platform, it offers the ability to associate human interactions (phone calls and voice and screen recordings, emails, faxes) with a business process. Imagine

having a consistent way to capture customer dialog as part of a business process!

CBPA leverages industry proven technology and techniques for the “work center” that are designed to remove human latency and optimize resource balancing. Organizations can use those same advanced technologies to optimize how work gets done in any “work center.” ACD technology is recognized as one of the most powerful in the world to handle distribution, management and reporting of work activity. Contact centers use it to distribute calls, e-mail, Web chat, and other communications. When this intelligent tool is used with work activities, managers receive insight into work flow and status. It can point out gaps to help management improve processes and reduce cycle time. Workforce Management can predict the headcount necessary to complete the anticipated amount of work. Historical data can be used to predict how much work there is to complete.

All these advanced technologies result in dynamic work “push” instead of static work “pull.” This reduces the human latency inherent in many other solutions where work simply sits waiting for an employee to pick it up and take action.

Having these capabilities can help organizations automate business processes, respond faster, control costs, and increase customer satisfaction.

In future articles, we’ll see the effect of CBPA on common business practices and the effect it has on workflow. Without costly custom programming or long implementation times. **CIS**

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Getting Satisfaction from SaaS

Software as a Service (SaaS) also known as hosted solutions or cloud computing is fast becoming a very popular method of delivering an increasingly wider range of contact center applications, as an alternative to premises licenses and thin-clients.

We approached a wide several leading firms on the benefits and issues with SaaS in the contact center. Here the answers, in whole and excerpted. Other and more detailed replies will be on TMCnet.com.

Enkata (www.enkata.com)
Liz Amaral, Senior Director of Product Marketing

There are a couple of reasons that customers are becoming fans of Software-as-a-Service (SaaS) solutions. For Enkata's customers, the choice was made because it involved minimal IT involvement, faster implementation and the ability to incrementally scale. Enkata's customers also preferred the lower up-front outlay of an annual subscription versus the traditional license/maintenance model. Additionally, the lower total cost of ownership is also a big plus.

The lines are blurred every day. It used to be that companies wouldn't consider any mission-critical applications in a SaaS model, but applications like Salesforce.com really broke that barrier. Today, Enkata see customers choosing to adopt SaaS offerings even for core infrastructure, such as telephony. The only applications that would not work as a SaaS offering are those that are completely proprietary to a company or require unusual customization. However, flexible, user-oriented applications like contact center performance management and analytics are a perfect fit for SaaS, because they take the burden off the overworked IT departments while helping customers solve challenging business problems.

SaaS-suitable solutions are definitely a growth area in the software arena. Technology, hosting and security standards have

evolved to the point that all types of applications are being offered in a SaaS model.

Almost everyone (with one or two notable exceptions) is now offering a SaaS alternative. We wouldn't expect traditional premises-based solutions to disappear completely, but whole product lines are now being offered exclusively as SaaS solutions, like Enkata's Strategic Service Suite. As long as customers want a choice, the two will co-exist.

One of the biggest objections to deploying SaaS solutions used to be security. Yet those fears have been laid to rest through countless audits of SaaS offerings.

Genesys Telecommunications Laboratories (an Alcatel-Lucent company) www.genesyslabs.com
Chris Morley, Program Director, Professional Services

Before we get into the benefits of a SaaS solution, let's first define how we look at SaaS. At Genesys, we view SaaS as a kind of continuum. Imagine a continuum where the y-axis is degree of customer complexity and the X-axis is degree of dedication to a given customer. The further north on the y-axis you go, the more complex the customer interaction. The further east on the x-axis, the more that given solution has to use dedicated components to meet the customer need.

So, the (0,0) point would be a true SaaS solution – requiring no customization and on a truly multi-tenant platform. As you move toward the upper right in the quadrant, you get more complex and more dedicated. You need to maintain some shared components to fit within the SaaS definition but the



customized needs drive a higher level of customer dedication. At Genesys, we have traditionally called these “managed solutions.” Along the continuum in this hosted space that ranges from “SaaS” (bottom left) to “Managed Solutions” (top right) there are varying degrees of customization and dedication that differentiate the various partners' solutions.

We're starting to see our partners and competitors trying to fill in the intermediate points and competing on the differentiated value they provide for the market that best fits that point on the continuum. They are leveraging multi-tenancy, trying to keep their costs low and thereby yielding a lower per-unit price than is possible in a dedicated solution. Some will compete on customization: of a SaaS solution that is better integrated into the customer environment and requires less process re-engineering by the end-customer. We think the winners will be the people who strike the right balance given their market segment.

There are some applications that fit easily the SaaS model and others that are much more customized. For example, we have a set of G-Plus adapters to allow Genesys to plug into leading CRM systems, or into call-recording systems. Those adapters never fit easily into a “pure” SaaS model because they are heavily customized and integrated into the customer's environment.

Other features really do fit the SaaS model. Our recent acquisition of Software Development Engineering highlights the impor-



tance of the Genesys Customer Interaction Portal (GCIP). GCIP is actually SaaS enablement software that allows end-user customers to configure their environment, build voice and routing strategies, etc, and do real time administration of their contact center resources. This is our premiere offering in the SaaS space. This approach reduces the cost and overhead to the partner of ongoing monitoring and maintenance because customers can do self-provisioning and self reporting.

Yes, in the contact center space, I've seen some very interesting things coming to market, even for low-end contact centers. When starting in a greenfield environment with modest or no pre-existing contact center applications, customers of the SaaS offers have to be able to bring up "virtual" contact centers in days or weeks with no real dependence on an existing PBX or ACD infrastructures. This seems to be the lion-share of the base of tens of thousands of hosted seat that have come on-line over the last couple of years.

I'll start with the last question because I think it answers the first. The simple answer is "no". For regulatory reasons, for customer intimacy reasons, there will always be a model for CPE based solutions. Having said that, will those CPE-based solutions eventually go from being their current blend of hardware and software based solutions to all software based solutions? The answer is yes. All of our competitors want to move to a software based solution. I don't believe everything will go to SaaS. But I do believe, contrary to common wisdom, that the SaaS model will expand beyond the small and medium business market. There will be lots of large companies who are and will be planning to buy a SaaS-based solution. And these are the companies that will drive the integration and customization requirements.

Let me be very specific. The first is customer transparency and control. The platform has to be transparent to the customer, even though they're keenly aware that it's multi-tenanted. They obviously can't see and don't want to see any other tenant's information. And you need to give them effective

control so they don't have to come in and do a professional service engagement if they want to change a routing strategy or add one-hundred new agents, etc. The second thing is customer information security. In a multi-tenant platform, you need to not only assure the customers that their proprietary information is secure and not being sent inappropriately over open internet or telephone lines, you also have to be able to—and this is going to be a battleground for the future—tailor information and security methods on a vertical basis.

Interactive Intelligence (www.inin.com)

Roe Jones, Product Manager

SaaS has these benefits: the customer has a lower initial capital investment compared to premises-based solutions, predictable monthly expenses instead of a large up-front payment, a service provider is responsible for the technology, enabling the customer to focus on its core business objectives, and customers can easily expand or contract services as business needs require.

Assuming the desired applications are available from SaaS vendors, and most today are (such as CRM, help desk, and contact center automation), the following are criteria that make a SaaS deployment particularly worth considering:

- The customer operates in an environment with minimal industry regulations/compliance, especially those related to off-site data storage
- The customer does not require highly customized applications
- Integration to existing systems is minimal, and the SaaS vendor has this integration expertise
- Developing the application is either not a core competency, or the customer does not have the IT resources to do so

We're seeing increased interest in both our SaaS-based contact center offering and our notification services. The migration to voice over IP and server virtualization has fueled growth in our new Communications as a Service (CaaS) offerings.

Another driver for SaaS is the economy. Customers are limiting capital expenditures, focusing on their core competencies, and looking for creative ways to deliver new technology without having to hire additional staff to manage these systems.

More vendors are launching SaaS solutions but we don't believe that premises-based solutions are dying. The majority of our business is, and will likely remain, premises-based. Given customers' diverse business models and requirements, there will continue to be both a market for SaaS and premises-based solutions.

SaaS has several challenges. These include:

- Security and ownership of data. Compliance issues with managing, securing and auditing sensitive information that may be stored at the service provider. The party responsible for securing the data may not be the same party that owns the data
- Multi-tenancy: keeping authorized users from seeing one another's data. Upgrades are rolled out to everyone regardless if a particular customer requires them. A multi-tenancy deployment (or analogous architecture, such as our CaaS multi-processor server with virtualization approach) can be necessary to optimize a limited set of system resources
- Scalability, namely an application's ability to service requests without response lag time. Given that SaaS applications are typically delivered via the Internet or an MPLS network, the amount of bandwidth greatly affects performance and costs. Applications delivered via a Web browser are typically plagued with slow response time
- Integration i.e. integrating SaaS applications with back-office systems is often challenging due to previously mentioned security and networking issues

The decision to go to SaaS depends on application costs and what the customer is including as an expense. We find that the average total cost of ownership over a three-year period to be just slightly lower for our CaaS offerings compared to a premises-based solution. **CIS**



Tuning Up (and Engaging) The Workforce Engine

Forget for a moment the fancy CRM, CIM, ACD/routing, and CTI solutions. The engines that truly drive contact centers, and the customer retention, satisfaction, revenue and income they get in motion are the staff. These are the agents who interact with the customers and the supervisors and managers who ensure quality and performance objectives that make these functions roll.

In good times and poor ones alike there continues to be a strong need to obtain higher productivity from the contact center employees. There is also an equally powerful demand to keep them i.e. minimizing turnover that costs money, and cuts performance through new hire recruiting, training, and resulting output lags as they come up to speed.

To achieve greater workforce performance and retention there are a wide range of new and improved technologies. These solutions span from pre-hire screening software to increasingly sophisticated workforce management tools, and to incentives/rewards applications.

There is strong interest by contact centers in making these investments even in the current recession say observers because they realize that their key to survival and future growth is their ability to retain and keep customers. And that means having well-trained, high performance, and loyal staff to accomplish this aim.

"Many companies realize that they have to invest in service side of the business," says Jeff Furst, President and CEO, FurstPerson, which specializes in employee pre-hire assessment solutions. "These smart companies have learned from the 2001-2002 downturn that when they did not put money into their people they damaged their businesses. Firms don't want to give customers reasons to switch."

Workforce issues

There are several issues that are impacting agent productivity and turnover. One of them is that agents must pass over higher skills bars. It is no longer enough for contact center staff to have pleasant voices and passable keyboard skills. They must have analytical and problem solving abilities and be equally adept at online communications as well as at using the phone.

Voice and web self-service applications are taking on more interactions that were once handled by live agents. That leaves those contacts that do come into centers today are for tougher issues from increasingly impatient and sometimes mobile customers and they come in via different channels, a call one time, an e-mail the next, and a chat session the time after that.

Another challenge is that contact centers are often poorly supervised, which is why too many agents underperform. Poor supervisors and coaches fail to monitor well, nitpick rather than focus on important issues, play favorites, and refuse to be flexible such on need to change shifts.

There is not surprisingly an observable correlation between bad supervision and declining productivity and climbing turnover. Unfortunately contact centers tend to promote to supervisors the best agents without assessing them for or training them on coaching, training, leadership, management, and administrative skills. Supervision and management requires talent that is not found in everyone.



"More than any other factor people tend to underperform or leave their jobs because they don't like their supervisors or direct managers," points out Furst. "While HR certainly has some influence here, our experience is that operations really owns the new hires and needs to make sure that they have the right supervisors with the right abilities and behaviors to perform."

Pre-Hire Screening Methods

Ensuring optimal contact center productivity and minimal turnover begins by hiring and promoting the right people. There are now automated psychometric-based Web-applied pre-screening and assessment tools to enable this. These solutions, based on personality matches and work-sample simulations, leave out for final consideration top candidate agents and supervisors. The web tools also have another benefit: they screen applicants for their online communications and multitasking abilities.

These solutions have two keys. They are a job analysis process that defines the competencies that drive successful performance and a local validation effort that calibrates the scoring model to the organization's business drivers.

"Personality assessments and work-samples have the most predictive power on job performance," explains Furst. "The web delivery method permits firms to easily use them 24/7. It can also enable candidates to experience the work while at the same time the hiring organization can obtain a better view how they will perform on the job."



One proven selection criteria is optimism, which Banks and Dean have incorporated into their Hire For Performance & Retention assessment solution, which provides predictions about actual job behaviors. The firm had come across Harvard medical research that found that optimistic people were successful because their behavior was planned; they embraced challenge and change and were more stable and disciplined in their work approach than others.

The individuals who pass these screens are then called in for in-person interviews for conventional contact center positions or interviewed over the phone especially for home agent postings. The conversations also enable voice skills assessment.

This process is becoming more automated. Furst is seeing more use of speech recognition to slice costs by eliminating the number of HR staff being engaged in conversations with applicants.

“The automated pre-employment screening from home takes a lot of work off the shoulders from the HR departments,” explains Furst. “They then know much more about the candidates and are spending the scarce and expensive face time or for home agents’ phone time they need with the most qualified. The entire process is accelerated, enabling hiring better people faster.”

Another benefit of these pre-hire assessment tools is that they obtain competencies about these individuals that could help trainers and coaches create and customize staff/career development programs that matches unique personalities with those attributes needed for success. As an example, a trainer understanding the competency make up of the new hire class might tailor specific learning modules based on the behavioral profile.

“If I as a manager get a much better sense of the agents’ different personalities and motivations I can turn these into strategies to improve output and reduce churn and implement them through knowing what buttons to push,” says Furst.

Maggie Klenke and Penny Reynolds of The Call Center School welcome these tools. Poor hiring and promoting have led to both poor performance and high turnover, they say. Pre-screening solutions also get around another issue: the inability of firms to use reference checks to verify aptitudes and past performance. Companies have been frightened off from this practice by successful lawsuits that have resulted from incorrect information given by employers about previous employees.

“We believe that hiring the right people in the first place is the right answer but it has been a question of interviewing people, and now there is technology to help,” says Klenke and Reynolds.

Workforce Management

There are new and increasingly popular workforce optimization (WFO) tools that can boost output and cut turnover. One of these is agent self-evaluation, whereby agents can listen to their recordings, check their performance metrics and if need to be schedule e-learning sessions.

Nike Golf implemented that feature on Envision Telephony’s solution and found that had helped create a positive work environment that challenges the agents to continually elevate their game, which helped to slice turnover. It also realized improved service quality, higher call resolution, and fewer escalations and was able to reduce new-hire phone training time by 50 percent.

Another WFO solution is enabling agents to change schedules without outside intervention, such as shifting shifts with colleagues that have the same skillsets, bidding for shifts, and going on vacation. This feature can be married with performance metrics, reports Jim Davies, a research director with [Gartner](#), and serve as agent motivators, such as granting preferred shifts, avoiding coming on holidays, or working from home to high performers.

“Providing agents with visibility into their performance via dashboards and the flexibility to swap or bid for shifts, book a vacation and enter their shift

preferences, all of which can be approved or rejected automatically and can take past performance into account, gives agents a highly motivating sense of control over their destiny,” explains Davies.

There are numerous other contact center applications that can boost agent productivity. Enkata’s FCR (first contact resolution) Metric Plug-in leverages the firm’s unique sequence detection algorithm to tag every call as either a first call or a repeat call, based on the customer, call reason and elapsed time since the previous call. Supervisors can now be aware of which agents who are causing the most repeat calls and coach them to reduce the volume.

Autonomy eTalk’s Assist which helps agents instantly find information to help customers by analyzing the last few seconds of the audio conversation using speech analytics, interpret what the question was, and populate the agents’ screens with the appropriate information or links. The solution reduces response times and promotes learning while boosting FCR rates and increasing customer satisfaction.

Finding out what your agents and supervisors think of your firm including your operations and image, and obtaining their suggestions can boost performance and cut churn. [Confirmit](#) offers automated online employee, corporate image, and exit surveys to obtain this information. Your staff is one of the best sources there is of ideas and insights and listening to them increases their loyalty because they then feel that they are valuable members of your team.

Making agents’ work easier helps gain more output and job satisfaction. Desktop unification software achieves this by minimizing the number of screens that agents have to toggle between through integrating with underlying applications. Vendors offering this capability include Cicero, [Jacada](#), and Microsoft Customer Care Framework.

“Say the agent has a change of address to enter and 8 out of the 20 applications running have customer address fields,” says Davies. “With the desktop unification software agents will have done it



once on the one screen and all those other systems have been updated.”

Coaching /Supervision Tools

There are new tools to enable more effective coaching and supervision. Knowlagent's Coaching & Performance Management solution includes patented technology that finds time for coaching sessions without impacting service levels and builds in adherence to coaching standards. The software allows you to train supervisors on how to be effective performance coaches and in turn provides supervisors with easy-to-use tools to diagnose agent problems and create individualized solutions. It also measures coaching impact and effectiveness.

Merced Performance Suite v3.5 enables supervisors to quickly and easily tailor their coaching activities to each individual agent's specific needs further boosting agent and operational performance. Preconfigured coaching and recognition workflows improve coaching consistency and effectiveness.

To assist coaches and supervisors there are e-learning tools that prompt improved agent performance through giving them training at their seats without sacrificing productivity occurred by leaving them. For example Verint's Impact 360 eLearning allows for the creation, assignment, delivery, tracking and reporting on individualized curriculums for each agent, group or center within an organization. Yet where individual coaching is needed a sister module, Impact 360 Coaching may schedule sessions.

Also Enkata's Enkata Manage automates agent performance data production and interpretation, and then presenting the highest value coaching topics for each agent or team. Enkata Coach makes coaching more productive and less contentious by attaching the specific calls that illustrate agents' performance challenges.

There are applications that cut the time spent in assigning staff, and giving more time to coach. GMT's new GMT Planet 9.9 workforce management solution offers what it calls 'multivariate scheduling'. This

feature meshes different performance-related attributes, including agent competencies, proficiencies, skills, customer satisfaction results, and quality scoring into a single blend of attributes which supervisors can then use to select and assign staff. The tool avoids the time-consuming tasks of having to check agents against each of these factors individually.

Infor's Infor HCM Workforce Management Business Edition also helps to reduce administrative work by as much as 60 percent. This leaves staff time to focus on more strategic activities that impact the bottom line and improve the work environment.

Time and resources spent in coaching can be cut with automated realtime monitoring and reminding tools that will correct agents' behavior, provided by firms such as E-Glue. If the solution 'knows' that an agent is not very good at a certain activity and the agent is about to do it, it will screen pop them and say 'don't forget to do A, B, and C'. If the agent tends to forget to ask customers for their cellphone numbers, when it takes that customers' details it will remind the agent to do so.

“If you're a really good agent then you will not know that this technology exists, but if you are awful agent then you will know definitely it is there,” explains Davies.

Automated Incentives Programs

There are automated employee performance incentives programs that

provide cash, gift cards, or other prizes to motivate staff and keep them loyal to employers. One of the more innovative is Xactly's non-cash-based Xactly Rewards program. Xactly's solution differs from others in that it is based on CRM application, in this case Salesforce.com, rather than the more typical WFO-based solutions.

The company says its method provides superior and direct performance-award accuracy because they are based on the actual results unlike WFO obtained in and through the CRM software. Xactly Rewards points can be based on any individual agent-connected metric, including customer satisfaction, FCR, problem resolution, and qualified lead generation rates and sales per hour.

Jeff Furst says these tools can be a powerful economic model as employees get better compensation that ties into overall business performance. At the same time they are no substitutes for excellent coaching, supervision, or corporate culture. Compensation, including rewards, ranks close to the bottom of the scale of why people leave: poor supervision is at the top.

“If you are going to deploy automated incentives/rewards programs you should align them closely against the behavior that leads to the business outcomes,” points out Furst. “Rewards also must be consistent or the employees will lose faith in it.” **CIS**

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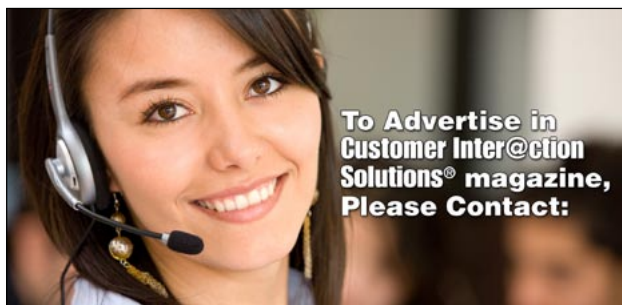
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Rx For The Downturn: Better Marketing, Better Customer Service

One would think that in a marketplace that is being buffeted by the nastiest economic downturn in years and by a shift in customers' attitudes from passive respondents to becoming active, empowered participants that companies would step up their marketing, backed up by strong customer service.

Yet there is unfortunately evidence to the contrary. And companies that fail to get the word out and do not deliver effective service risk failing, period.

"The most amazing statement I have heard in my career - and I am hearing it frequently these days is - we are waiting for sales to pick up so we can start marketing," wrote TMC Group Publisher Rich Tehrani in his blog. "This is the equivalent of going to the fireplace and telling it you are waiting for it to produce heat before you put a log in. This is obviously lunacy... Marketing to your potential customers is what allows your sales to begin with. You can't increase sales without increased PR and/or marketing."

Alas a new report by the Chief Marketing Officer (CMO) Council reveals that a majority of senior marketers admit their companies are failing to take decisive, company-wide action to integrate customer voice and experience into key business and marketing processes.

The study, "Giving Customer Voice More Volume," reported that 56 percent of over 400 executives surveyed said their companies have no programs in place to track or propagate positive word of mouth among customers. In addition, only 30 percent said their companies rate highly in their ability handle and resolve customer problems or complaints. A surprising 59 percent of said their firms do not compensate employees or executives based on customer loyalty, satisfaction improvements or analytics.

The report, sponsored by Satmetrix, also revealed that two-thirds of companies do not have 'voice of customer' programs in place and that only 12.9 percent of companies have deployed real-time systems to collect, analyze and distribute customer feedback. While 74.6 percent say they receive customer feedback via e-mail, only 23 percent say they track and measure the volume and nature of these messages.

The issue isn't that the CMOs don't get it. Most do. Over 80 percent of respondents said positive customer experiences and word of mouth have helped their brands and businesses grow. 45.8 percent admitted that high-profile negative customer experiences had at some time compromised their brands.

Yet their execution of customer strategies leaves sometimes something to be desired. Nor does it appear that they frequently made convincing cases for strategies to improve the customers' experiences at the C-level.

I contacted the CMO Council and asked its executive director, Donovan Neale-May:

- Why companies are failing to take decisive, company-wide action to integrate customer voice and experience into key business and marketing processes?
- What is stopping them?
- What the council's recommendations to CMOs to get senior management buy-in?

Here is his reply:

"Many chief marketing officers have the title, but not always the territory. Too few have embraced the web (for surveillance and conversational tracking) or teamed with IT to deploy sophisticated real-time listening and feedback systems. They lack the visibility into customer experience at multiple touch points (call centers, point of sale, help desks, eCommerce transactions, account management, field sales, channel, etc.) due to data being siloed, functionally isolated and not fully integrated. Nor do they always have the authority to make business policy, pricing, process, or product changes.

"Without ownership and accountability for both customer voice and experience across the enterprise, CMOs will continue to struggle for influence and effectiveness. They need a CEO mandate and consistent commitment to creating customer-centric cultures with organizational and operational alignment to achieve this state of being.

"The best way to get senior management buy-in is to conduct pilots with web-centric communities, feedback systems, loyalty programs, and user groups. This can evidence value and show where better listening, learning and leveling can improve customer retention, loyalty, advocacy and lifetime value."

The economy is in the crapper not only because of excess greed bordering on maliciousness and criminality but also because nominally very bright people didn't get their acts together. In this case those of you who are CMOs, CCOs, or hold similar positions have the intelligence and the savvy to figure out an effective marketing/service strategy and put it forward in a way that your firm's C-suite inhabitants will pay attention to, and do so ASAP. **CIS**

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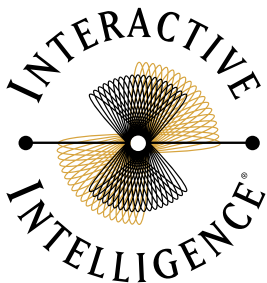
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