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- Mobile CRM for Customers and Staff
- How SIP IP Improves Productivity

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Nadji Tehrani, CEO, Technology Marketing Corp.

Effective Hiring and Keeping "The Right People"

44 Characteristics of "The Right People"

Nowadays, because of the current horrible state of the economy and the fact that Mr. Obama has decided to spend trillions of dollars to create three to four million jobs in America, it seems appropriate to revisit a recurring theme I have featured in some past editorials, specifically on "Effective Hiring" in order to make judicious selections of "the right people".

Successful managers are those who surround themselves with **"the right people"**, give them direction and then get out of the way.

The vitally important question to ask is, "Just how do you define **"THE RIGHT PEOPLE"**?"

In the accompanying list, I have tried to spell out some characteristics of **"the right people."**

Most companies wrongly spend 98 percent of their time talking (yes, talking) about customer service, customer care and customer retention, and practically never talk about employee service, employee care or employee retention!

This misguided philosophy leads to excessive employee turnover and, eventually, will result in "customer turnover", which means substantially higher costs for training new staff, not to mention loss of revenue! Once a company learns that without a competent staff armed with a flexible, positive, can-do attitude, there will be:

- No customer service;
- No customer care;
- No customer retention; and
- No progress,

...the company is prepared to focus 100 percent on that elusive, highly complex (if not impossible) task of hiring "the right people" and keeping them.

In the March 2006 issue of this publication, Mr. Ted Nardin, Senior Director of Performance Management of ClientLogic, a Top 50 teleservices company, penned an excellent article titled *Hiring and training For The Call Center: Developing The "Universal Agent" And Beyond* (<http://tmcnet.com/7299.1>).

In his article, Mr. Nardin focused on effective hiring for the call center. Here are a few excerpts from his article:

"Transforming a call center from a cost-cutting afterthought to a viable brand-carrying profit-generating division of business begins by establishing effective hiring processes and training programs."

"If staffed and managed properly, the contact center can be an invaluable asset to the business."

The 44 Characteristics

I describe "the right people" as those who genuinely subscribe to the following guidelines:

1. Have a flexible, positive, can-do attitude;
2. Genuinely try not to make mistakes;
3. Don't make excuses for mistakes;
4. Don't miss deadlines;
5. Do a great job every time;
6. Remember every detail;
7. Take pride in what they do;
8. Don't say, "It's not my job";
9. Say, "Let me do it for you";
10. Offer unsurpassed customer service;
11. Are part of the solution, not the problem;
12. Are great team workers;
13. Are on the job every day on time!
14. Set a great example;
15. Avoid being politicians and don't play political games;
16. Are not high-maintenance people;
17. Know that winners do what losers don't want to do!
18. Follow the vitally important rule of Transparency;
19. Never keep management in the dark about any issue, good or bad!
20. Have a GREAT work ethic;
21. Believe that "the harder I work, the luckier I get";
22. Are not clock watchers.
23. Come to work early, do a good job and leave late;
24. While at work, they spend 95 percent of their time working exclusively on company-related projects;
25. Know that if they have a problem with company policy to discuss it with management!
26. Don't badmouth their employer in their blogs or Web sites! That's like biting the hand that's feeding them!
27. Go out of their way to be extremely helpful to customers, other employees and team members;
28. Know that if they don't like something, they should develop a BETTER solution to the problem, then inform management and persuade them that doing it the employee's way is a better way! They know that complaints do not achieve anything except lowering morale! In which case, management is justified to terminate such people after adequate warnings;
29. Are model employees, and are encouraged to come up with new cost-saving and/or profit-generating ideas;
30. Avoid chronic complaining;
31. Avoid being 'bad apples';
32. Are honest and never lie;
33. Never abuse expense accounts. The right people know that such abuse is equivalent to stealing;
34. Never get involved in sexual harassment;
35. Have a great sense of humor;
36. Are never pretenders. If they don't know the correct answer to the question, they say, 'I don't know,' they don't make up answers;
37. Don't create problems
38. Try to prevent problems;
39. Spend company money like it was their own; i.e., don't waste it;
40. Don't cover up mistakes and lie. Studies show that 20 percent of employees lie to management to cover up mistakes;
41. Don't abuse company e-mail for frequent personal use;
42. Are sure to under-promise and over-deliver;
43. Treat customers with the highest levels of integrity, dignity, truthfulness and professionalism;
44. Last but not least, they uphold company values to the fullest extent **CIS**

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

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IN EVERY ISSUE

- | | |
|--|---|
| 1 Publisher's Outlook
By Nadji Tehrani, Executive Group
Publisher, Technology Marketing Corp. | 19 From the TMCnet Blogs |
| 4 High Priority!
By Rich Tehrani, Group Editor-in-
Chief, Technology Marketing Corp. | 20 On The Line
By Tim Searcy |
| 6 Headset
By Keith Dawson | 16 Special Focus
Leveraging Your Communications
System to Automate Your Business
By Dr. Donald E. Brown, CEO,
Interactive Intelligence, Inc. |
| 7 Customer Interaction News™ | 24 Special Focus
Supplier Survey: Headsets |
| 7 CallCenterComics.com
By Ozzie Fonseca | 31 The Integrated Marketplace™ |
| 10 Compliance Desk
By Brendan Read,
Senior Contributing Editor | 31 Advertising Index |
| 11 Ask the Experts
By Tim Passios, Interactive Intelligence | 32 Logout
By Brendan Read,
Senior Contributing Editor |

What's on the Cover



**Quality Buying for
Quality Monitoring**

pg **12**

WORKFORCE OPTIMIZATION

- 12 Quality Buying for Quality Monitoring**
By Brendan Read, Senior Contributing Editor

CRM, BPO & TELESERVICES

- 22 The Mobile CRM Convergence**
By Brendan Read, Senior Contributing Editor

AWARDS AND RECOGNITION

- 27 Customer Interaction Solutions' 10th Annual
CRM Excellence Awards, Part 1**

CALL CENTER TECHNOLOGY

- 28 S(L)IPping IP Into The Contact Center**
By Brendan Read, Senior Contributing Editor

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Rich Tehrani, Group Publisher, Technology Marketing Corp.



VirtualLogger Shows How to Prosper In a Tough Economy

These are obviously challenging times for most businesses but there are those companies who do well in this environment. Some like those providing hosted/SaaS solutions are prospering in part because of reduced CAPEX budgets.

VirtualLogger is one such company that in the face of predictions of contact centers scaling back and contracting in 2009 has increased its revenues and by more than 25 percent. Upon hearing that excellent news and wanting to get the firm's insights I immediately contacted the company and interviewed Cliff LaCoursiere, VirtualLogger's SVP Sales and Business Development.

• Please tell me about your company

VirtualLogger was founded to provide a unique offering in the contact center call recording and quality monitoring (QM) market by delivering products as a service. The Software as a Service (SaaS) delivery model is a proven success in related businesses, including hosted CRM and ACD offerings. By leveraging a hybrid SaaS approach, VirtualLogger provides a unique offering in the cost sensitive small to medium call recording/QM market.

• You recently had great revenue news, please share the details

VirtualLogger has experienced its Q1 recording and QM revenues growing at a 28 percent annualized rate. We attribute this growth rate to the company's unique delivery approach. VirtualLogger delivers recording and QM services on a pay-as-you-go delivery model, virtually eliminating up-front costs. The result is that we can offer a positive ROI in months rather than years

• Why do you think the economy has actually helped boost sales?

We believe that the current economic slowdown has put a spotlight on the value and financial advantage of the VirtualLogger delivery approach. The slowdown has increasingly forced call centers to scrutinize spending, look to alternate approaches to providing better services levels at lower costs, and preserve capital. VirtualLogger not only offers better service levels at lower costs, it also reduces upfront cash requirements and protects clients from downside risk.

• How many agents does a typical customer have?

VirtualLogger is squarely focused in the SMB market space, so our typical contact center size is approximately 75-250 agents.

• How does your solution integrate with other hardware/software in a contact center?

VirtualLogger records on either the trunk or station side of an IP or TDM telephone system. The technology is compatible with all major brands of switches and ACD's including Avaya, Cisco, Aspect, Nortel, NEC, Intertel and others.

• Do you expect sales to slow if the economy picks up?

Just the opposite; the economy has issued a wakeup call forcing companies to look more closely at expenses. Any initial uptick will encourage business to invest while the uncertainty during the early stages of a recovery will make business cautious. The answer to this dilemma is a model that allows investment while protecting against downside risk. Once contact centers see the value of the delivery model, we expect the trend to continue, since its likely companies will continue to look for good values to reduce expenses and make the most of cash.

• Why should companies consider hosted recording solutions?

Companies will continue to adopt hosted recording at an increasing rate to reduce upfront costs, avoid technological obsolescence, and perhaps more importantly, have the flexibility to scale their services needs as business swings and seasonality effect revenue.

• And why choose VirtualLogger?

VirtualLogger is the first company to offer recording and quality monitoring as a service. We have years of experience, and have developed the technology to deliver reliable services at a cost that's unbeatable by company's selling premise based solutions. We think that's a winning combination and customers are voting with their dollars to prove the point.

• What is next for your company?

We try not to pre-announce products, but it's safe to say that we'll be adding features akin to much larger suite offerings in the contact center market. Since VirtualLogger sells a service, we have to earn our keep every day, so we tend to listen carefully to what our customers want. **CIS**

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Keith Dawson, SENIOR ANALYST, FROST & SULLIVAN



Workforce Management Grows New Legs

As recently as the mid-1990s, true workforce management software was too expensive a proposition for contact centers in the middle or low end of the marketplace. A center had to devote significant resources to purchasing (and managing) the complex, standalone systems of that era. The choices available were either sophisticated high-end tools that threw massive computing resources at the complex problems of skills-based routing and multi-site management and cost hundreds of thousands of dollars — or very rudimentary “calculators” that were little more than spreadsheets with Erlang C functions built into a pick-list interface. Little wonder that many medium-sized centers chose to go their own way and build Excel spreadsheets to do their workforce planning.

Late in the 1990s the first mid-market tools with real usability and lower cost started to emerge. Some of those tools are the original systems that are now embedded in the big suites — Blue Pumpkin, for example, which found its way into Witness’ QM suite and then into Verint’s. Other suites contain what were once marketed as the high-end standalone tools. The most widely used tool of the early 1990s was one made by TCS, which was acquired by Aspect and over time and many versions and improvements became the foundation for Aspect’s eWorkforce Management. A similar tale can be told for IEX’s very sophisticated multi-site WFM tool that is now part of NICE’s SmartCenter.

And there are still smaller, independent vendors of WFM, though increasingly we find that they need to collaborate closely with vendors of other parts of the agent optimization spectrum. Few contact centers are willing these days to buy WFM in a vacuum; they seek to buy it as an integrated component. Regardless of how WFM is purchased, and by whom, we have reached a point where there is rough feature parity among vendors for the basic design of WFM. The technology is well understood, and there is a widespread consensus that using WFM is one of the quickest ways for a contact center to streamline processes and get maximize cost efficiency.

What is amazing is how many centers there are, at all levels of the marketplace, that still use internally-developed systems to do their scheduling. A 2006 Frost & Sullivan contact center end user survey found that 32% of centers were not using WFM to schedule their agents. The implication is that they were using homebrew schedulers, most likely spreadsheets. But Homegrown systems don’t have the kinds of call volume forecasting that makes labor allocation more efficient. They don’t have worker-friendly features like shift bidding, incentives and visibility into future plans.

When asked what deterred them from using WFM, the most cited answer was cost (44%), and then complexity (42%), and then lack of ROI (35%).

It is fair to say that those answers, and the large portion of the marketplace that is eschewing WFM, indicate a misreading of the capability, the effectiveness and the relative cost of running today’s WFM.

Some of this misperception may paradoxically be due to the efforts by the vendors to more tightly roll the WFM components into the agent-facing suites. In touting the analytic, quality management and enterprise-friendliness of their agent suites, they may be missing an opportunity to speak clearly to a part of the marketplace that has an urgent need for better forecasting and scheduling tools, but that doesn’t have the context or the tenure in the industry to see the true value of this steadfast old product.

The largest vendors in the sector have become (understandably) convinced that in order to succeed they have to transform themselves from contact center application providers into enterprise application providers.

To do that, they are trying to leverage their existing workforce management tools and make them useful to other, non-contact center departments. This is their way of moving up the corporate value chain. If contact centers can benefit from having software that quantifies “work” (in the form of calls) and allocates resources according to the most effective workflow formula, then why can’t retail, back office and other kinds of workers use the same system? They can.

By some estimates, there are as many as three to five times as many schedulable seats to be found outside the contact center as in it. When that many seat licenses are at stake, vendors will naturally begin listening intently to the needs and feature demands of those buyers. One major vendor already finds more than 40% of its WFM revenue coming from outside the contact center. That is going to tip the balance of purchasing power away from contact center managers and towards interdisciplinary committees of executives. They, along with IT management, will determine the needs and priorities of what are becoming enterprise-wide workforce management systems. **CIS**



- Envision Telephony (www.envision-inc.com) has produced a new version of its unified workforce optimization platform, Envision Centricity 9.7. It has clip authoring to enable creation of training videos that include voice recordings and screen captures of any application, Web page, or document. It now enables customers utilizing selective recordings to utilize the full custom tagging features for recordings that were previously only available to full time recording customers. It is now localized in Spanish and German

- Newfound Communications (www.newfoundcomm.net) new Newfound IP Call Recorder version 1.5 has Pause and Resume Recording which can temporarily stop and start recording while maintaining a single file from the call. This feature better enables an IVR to omit sensitive information such as credit card or account numbers out of recordings. IP Call Recorder 1.5 also has a new record and save feature that enables storing only the most essential recordings. It initiates recording at the beginning of calls and keeps the recording only if an escalation occurs

- Nortel (www.nortel.com) has developed new and enhanced contact center solutions. Its Contact Center 7.0 is a native SIP-based solution featuring integration with Microsoft Office Communications Server 2007 with unified communications. It also has open application programming interfaces using a services-oriented architecture (SOA) integration and predictive dialing. It also has a Service Creation Environment via a graphical 'drag and drop' tool that simplifies workflow creation at 5x the speeds of traditional applications.

Also, [Nortel's](http://www.nortel.com) Interactive Communications Portal now includes features such as outbound answering device detection, and supports the

Avaya AES. Its Agile Communication Environment (ACE) supports wider presence capabilities via [Microsoft](#) OCS 2007 plus integration with IBM Lotus Sametime Client 8.0.1 for click to conference and enhanced presence. ACE has also has application customization, prototyping, and custom application development

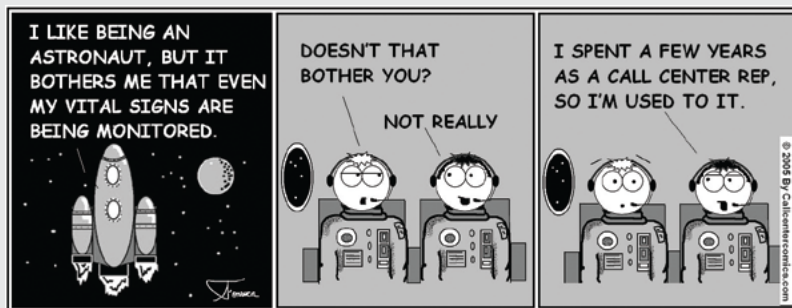
- [Siemens](#) Enterprise Communications (www.enterprise-communications.siemens.com) has released OpenScape Xpressions. It offers built-in voice mail, unified messaging, instant messaging (IM), presence and audio and web conferencing and point-and-click calling and video/web conferencing. Xpressions can show user presence status and user profile sharing, including location information to streamline communications and supports multiparty IM sessions. It also has Visual Voicemail, providing access to voice messages via the software's desktop interface

- Syntellect's (www.syntellect.com) has come out with Syntellect Communications Portal Version 7.2. The new features include additional speech technologies vendor support, efficiency enhancements for MRCP V2, new features for [Syntellect](#) Studio, CTI Link Resiliency, and support for Windows Server 2008

- Varolii (www.varolii.com) has three new hosted outbound com-

munications products. Varolii Call Me Now launches SMS notifications and allows recipients to respond via text; they can be connected to agents or finish the interactions with automated voice calls. Varolii Generations tailors communications to generate responses from Generation Y, Generation X, Baby Boomers, and seniors. This is achieved by altering the channel (SMS, voice and e-mail), voice treatment, message patterns, and previous response outcomes, such as time of day or male/female voice. Varolii Contact Center Agent automatically notifies agents to ensure staffing requirements are met, even if unexpected events disrupt operations

- With more firms relying on IP for home agents and presence there is also a greater vigilance needed to make sure that they are secure. WatchGuard® Technologies (www.watchguard.com) is helping to do just that with the release of a new operating system for WatchGuard security appliances: WatchGuard Firewall XTM. With it WatchGuard customers can extend the capabilities of their unified threat management firewall appliances to include a bevy of new security features, networking capabilities and management functions. Firewall XTM defends networks by adding innovative security features, including full HTTPS inspection, VoIP security, and IM and Peer-to-Peer (P2P) application blocking.





ShoreTel's ShoreWare Contact Center 5

ShoreTel (www.shoretel.com) has made delivering contact center functionality, including to the growing ranks of home-based agents, more versatile, reliable, and easier to manage with its IP-based ShoreWare® Contact Center 5. ShoreWare Contact Center 5 offers increased capacity, hot-standby redundancy for disaster recovery, and new supervision and reporting features.

Leveraging ShoreTel's unified communications platform, ShoreWare Contact Center 5 is an all-in-one application for contact center communications, including inbound and outbound calling, e-mail and web chat, supporting home, branch office, and traditional contact center-based agents. With ShoreWare Contact Center 5, the highly productive, cost-effective virtual contact center is now a reality. The solution also delivers presence, instant messaging, and video. It has an IVR integrated with the platform that is customer-intuitive that results in high call deflection rates and lower costs.

Key Features and Components

- Support for up to 600 simultaneous agents and 2,000 total configured agents
- Hot-standby redundancy helps ensure rapid disaster recovery and provides protection from wide area network failures
- Supervisors can easily manage agents in a web chat session with the ability to monitor, whisper, barge, and coach the session. They can also send targeted, group-related, real-time information and messages using the enhanced Agentboard application
- An intuitive, graphical script builder enables businesses to easily modify applications to meet changing business conditions, which helps ensure that the best agent responds to the caller's unique requirements
- An IVR system integrated with the platform that enhances the customer experience, and provides more self-service features for callers
- Predefined standard reports help drive down costs by providing the information supervisors and managers need for effective planning, without requiring them to build customized reports in external reporting packages. It also supports advanced analytics, providing the business intelligence necessary to address customer complaints, or for agent training

System Requirements

Contact Center 5 software is fully supported on ShoreTel Unified Communications platform.

Pricing

The suggested list price for ShoreTel's Contact Center solution starts at \$550 per agent. ShoreTel's more advanced Enterprise Contact Center starts at \$1550 per agent. Additional supervisors, multi-media, and other optional components are available separately based on the customers needs. **CIS**

Tough economic times demand careful investment in technologies that reduce operating costs, help retain customers, and make people more productive. ShoreWare Contact Center 5 provides comprehensive contact center and unified communications capabilities that dramatically increase productivity and enhance customer service. Our bundled capabilities, simplified management and ease of use lower the total cost of ownership and protect the investment for the long term.

**Kevin Gavin,
Vice President of Marketing, ShoreTel**

ShoreWare Contact Center 5 has been specifically architected for distributed enterprises using the [ShoreTel](http://www.shoretel.com) Unified Communications platform. The same desktop software client application ShoreWare Call Manager is the software foundation for the client application used by contact center agents. This reduces the cost for deploying and supporting enterprise-wide client applications.

CosmoCom's CosmoCall Universe version 6

CosmoCom (www.cosmocom) has added so many new capabilities and enhancements to its CosmoCall Universe (CCU) IP-based platform that its new CCU version 6 offers a new dimension in delivering customer service and operational efficiency.

CosmoCom has introduced two new user types: ReadyRep and Business User, which are lower-cost partial usage-based licenses in addition to the existing CosmoCall agent. The ReadyRep licenses connect subject matter experts or others that have other knowledge and skills such as field techs via the ACD or through presence. The Business User licenses are basic extensions but are not connected to the ACD. They permit administrative, back office, management, and marketing to use the CCU platform.

CosmoCom now permits users to connect into the CCU via their wireless devices. The new solution, CosmoGo™ gives expert agents, knowledge workers and others who need to be mobile connectivity to the ACD, screen pops, and inquiry and transaction enablement. CosmoCom has also given desktop-bound staff a new option: the CosmoPhone SIP-based desktop phone as an alternative to softphones.

The CCU 6 features CosmoDashboard reporting which lets supervisors and managers creatively and imaginatively configure their reports from 'gadgets': programmable tools that make charts, graphs, tables, and clocks. It also enables administrators to create standard views for different applications and supervisors to devise personal views and permits them to share the information with others.

Key Features and Components

- ReadyRep and Business User licenses
- CosmoGo smartphone application
- CosmoPhone SIP-based desktop IP phone

- Virtual outbound calling, including from multiple sites and home agents
- Linked Campaigns: multiple lists in different formats can be easily combined into a single campaign
- CosmoDashboard graphics-based reporting
- Optional CosmoCorder multichannel screen recording (voice, e-mail, and chat)
- Integration with Microsoft Outlook

System Requirements

CCU is available as a premise-based solution from CosmoCom and its resellers, and as a hosted service from service providers. It runs on standard Wintel servers and interfaces directly with SIP trunks from the PSTN, or with any SIP or H.323 media gateway. Agents and ReadyReps need standard PCs and IP connectivity. CosmoPhone is optional. Basic Business Users require only a CosmoPhone. CosmoGo requires 3G or higher with simultaneous voice and data.

Pricing

CCU as a premise-based solution is licensed by users and options. Users include Agents (concurrent or named), ReadyReps (named only), and Business Users (named only). Basic Concurrent Agents list for \$2,350, ReadyReps for less than \$600, and Business Users for \$60. CosmoPhone prices range from \$130 to \$280, depending on the model. Pricing for CCU as a hosted service varies with the provider from a fixed fee per user per month, to pricing models based on minutes of use. **CIS**

Dear Tom,
Some contact centers have a message stating, "If you would like to participate in a quality assurance survey, please ask the representative to transfer you." But, if it was a "bad call" what stops the agent from "accidentally" not transferring the call?

Some studies show that up to 30% of a contact center's operating cost is spent dissatisfying the customer—not achieving First Contact Resolution (FCR). Consider a contact center with the following statistics:

Average Handle Time
(AHT) = 210 seconds
Call Volume = 150
Seated Agents = 22

This center would achieve a service level of 85%/20 seconds. However, if the call volume increased 20% due to a low FCR, the actual **service level would drop from 85% to 30%!!**

Measuring FCR with an IVR survey should be done **automatically, not rely on an agent transfer**. For those customers whose contact was not resolved, the survey should ask an open ended question to capture the customer's description of the problem. This proves invaluable in correcting process issues.

Zeacom offers an IVR Survey module fully integrated with our contact center routing solution that seamlessly offers the survey to your customers; and if selected, the call is automatically transferred to the survey sight unseen to your agents. Think how agent performance improves knowing every single contact can potentially be scored by the customer!



Tom Farquhar is the Business Process Specialist for Zeacom. He has 17 years experience improving contact center operations

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Be Aware of New HR-Related Laws, Tougher Enforcement: Legal Expert

Contact center executives who are focusing on managing costs and retaining and attracting customers need to be aware of and plan for new HR-related laws and ensure compliance with existing similar statutes and regulations to avoid being tripped on them.



Gayla Crain is a shareholder in the Dallas, Texas-based firm of Spencer Crain Cabbage Healy & McNamara, practicing labor and employment law and litigation. She has identified the following regulations and issues that contact centers must pay especially close attention to:

- More and increasingly successful claims against employers that are downsizing for letting go specific employees based on what claimants say are for age, gender, disability, and race reasons. Crain reports a sharp uptick in such lawsuits in 2008 as companies begin to shed staff.

To avoid such litigation she recommends that employers first clear up any internal discrimination or harassment complaints or claims to avoid even the faint appearance of singling out staff. They can then devise downsizing plans based on fairly-administered criteria that would stand up in court. These include job elimination, office, or facility closure providing that the firms do not open, expand, or have similar jobs openings in the same metro area, and staff layoff selection based on dates hired and objectively-determined-and-measured employee performance.

Crain also suggests going one step further: offering employees severance and/or healthcare insurance in exchange for signing waiver agreements that release their right to sue. The new economic stimulus package includes a COBRA (Consolidated Omnibus Budget Reconciliation Act) subsidy that cuts employer costs to 65 percent from 80 percent, though only for nine weeks

- The Americans with Disabilities Act Amendments Act of 2008 (ADAAA). The new law changes and broadens the definition of disability in four ways. These are: impairment must be considered without corrective measures; impairment can be episodic or in remission if the medical condition would be a disability when active; major life activities now include bodily functions; and the interpretation of “substantially limits” has been broadened. The ADAAA requires employers to make reasonable accommodations for workers with disabilities once the worker requests an accommodation.

Crain advises employers to discuss with employees who say they are disabled how to effectively and fairly provide accommodation. These need not be expensive: they can be as simple as permitting them to get out of their workstations every two hours to walk around. They can also include working from home, which according to The Telework Coalition can benefit employers by cutting facilities costs and bolstering productivity

- A Family and Medical Leave Act (FMLA) amendment signed also in 2008 that permits employees to take up to 26 weeks for every 12 month period to care for injured or ill family members who are active duty military personnel. These individuals are hospitalized for periods of time and then they are in rehab or outpatient situations but they still need care. The definition of family members is broad: spouses, offspring, parents, and next of kin.

Crain recommends that employers build in enough flexibility into their HR and

staff management to allow for additional leave. These strategies include budgeting for hiring temporary staff and dividing up the work

- Liability and tax issues over contracted staff: including on-premises outsourced a.k.a. insourced and independent home-based staff such as contact center agents.

One of the most common matters that arise with such arrangements is liability for discrimination, harassment, and workplace injuries at contracting organizations’ premises. Crain says courts have ruled that both parties: the contracting firms whose site the work is being performed at and the contractors share equal responsibility for such matters.

Another related issue is treating contracted insourced and independent workers as employees, such as by ordering them to work more hours or taking on added tasks than provided for in the contracts. Such incidents happen because line managers sometimes do not see the distinction between insourced workers and employees especially if they are in the same premises. These matters can best be handled by educating managers on procedures.

“While these agreements are typically very flexible to allow for added work and duties in certain cases,” says Crain, “this is an extra step that avoids being liable for companies’ incurred current and back overtime, payroll taxes, tax withholding, and workers’ comp costs.” **CIS**

CBPA and CEBP Are Not the Same



By Tim Passios,
*Director of Product
Management*

In previous articles, we examined how automating business processes using Communications-Based Process Automation (CBPA) positions a company to gain a competitive advantage in today's market. In addition, these optimized processes place a company in the catbird seat when the market trends up because they are prepared to handle significant increase in production without increasing employee count.

However, based on the responses we've been getting surrounding our articles, it is clear that I need to clarify one big point – how is CBPA different than Communications Enabled Business Processes (CEBP)?

Let me see if I can clarify this. While talking with an analyst in the communications field, he asked why we weren't talking about CEBP like everyone else. "It is clear," he said, "that this is a term that is adopted by the market and seems to resonate well with customers looking to automate their business processes." I told him the reason we don't talk use "CEBP" was simple – there is major difference between CEBP and CBPA. Puzzled, he asked me to explain.

I told him CEBP only embeds communications into a business process while CBPA actually goes one major step further and actually automates those processes and embeds communications throughout the process. Apparently he didn't get the difference. He described his customer was using another product to send notifications to key personnel once each step of an automated process had been completed. To him, CEBP and CBPA were not different.

Using his example, I asked him, "Who was doing the actual automation of the business processes?" He replied, "Uh, I don't know... some process automation tool. Why?"

"Because that 'process automation tool' is exactly the difference between CEBP and CBPA. CBPA queues, routes, monitors, reports, and messages throughout those processes, all within the same application and without the need to integrate different systems!"

As we talked, I contrasted a simple business process that could be automated by a CEBP or CBPA tool — widget order processing. Let's keep this simple with just a few steps.

1. A salesperson faxes in an order
2. A sales admin pulls the order off the fax machine and manually enters it into the order processing system
3. Order fulfillment opens up the order processing system, identifies the customer's order, picks the order from the shelf, and ships it out the door.
4. Order fulfillment checks a box inside of the order processing system indicating the order has been shipped

Keeping things very simple, here is how CEBP would handle this process:

1. Assuming some automation, the fax is received via a fax server and an automated notification is sent to the salesperson acknowledging receipt of the fax.

2. Another notification is sent to the sales admin that a new order arrived. The fax sits waiting for the admin to open and enter it into the order processing system – human latency is still present.
3. Once the admin opens the fax, reads it, it gets manually entered into the order processing system – human error is still present.
4. An automated notification is sent to order fulfillment notifying them of a new order. The order sits waiting until order fulfillment processes it – human latency is still present.
5. After order fulfillment opens the order processing system, they repeat the existing process and manually update the system.
6. An automated notification is sent to the customer informing them the order has shipped.

Again, keeping things very simple, CBPA would handle this process very similarly, but with additional functionality, including all the same notifications:

1. Once the order is received in the fax server, it is scanned using Optical Character Recognition (OCR) to capture sales, customer and order information and automatically enters the information into the order processing system.
2. Instead of the order sitting idle waiting for one particular sales admin to open the system, it is queued and routed to the next available sales admin (based on their availability using presence) for approval. If the sales admin doesn't process the order in a timely fashion, it is rerouted to another sales admin to ensure it is handled promptly.
3. Once the order is approved, it is queued and routed to order fulfillment based on their availability using presence. Again, if it isn't processed in a timely manner, it is rerouted until it is fulfilled.
4. Throughout this entire process, supervisors, sales managers, executives, and anyone else can view the status of this order through a supervisory console. At any step in the process, alerts can be triggered to notify them of delays or completions.

CBPA differs from other methods because it uses queuing, routing, presence, recording, and supervisory monitoring to track the entire process and automate as much as possible. Those differences give CBPA-enhanced processes a clear ROI and offer companies a competitive advantage. **CIS**

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



Quality Buying For Quality Monitoring

Quality monitoring (QM) solutions have become central to contact center performance. These tools capture the interactions between your customers and agents and in doing so are invaluable in ensuring excellent customer-retaining service. QM also obviates fingerpointing in disputes with electronic records of what was said.



Given the importance of QM solutions, Customer Interaction Solutions sought advice from experts and leading firms on how best to source and buy them. We asked questions on identifying and buying trends including social media in due diligence, standalone QM solutions versus workforce optimization (WFO) suites, the [SaaS](#) option, pricing, and best practices in selecting QM solutions and suppliers

We have included responses from three industry firms. Those from leading experts will appear on TMCnet.com.

Calabrio (www.calabrio.com)

Kristen Jacobsen, director of marketing communications

The need for recording solutions has not changed, but the emphasis on the reason for recording has shifted somewhat. We are seeing more emphasis on solutions for compliance and risk mitigation than quality, though quality solutions are still being purchased. The trend is for solutions that support multiple sites and are flexible enough to record any employee at any location, so an architecture that supports that reliably and affordably is key. Companies are doing more knowledge worker recording, not just contact center agents. Companies can't afford to put a server at every location.

We answer questions from partners and customers through knowledge base wikis and blogs and have since we started as a company a little over a year ago.

Some customers want to buy stand alone solutions and some want to buy integrated suites. The best solutions can be purchased both ways. When integrated, they work together to make the other more powerful in terms of cohesive workflows and reporting. As a stand alone, they must provide the key features the business needs. The advantage is that the company can always add other applications in the suite down the road and they will be fully integrated. We are a lot of that buying behavior. A company will start with QM for example and add WFM down the road.

SaaS is a good alternative for some businesses, though some features become more difficult to deliver in this model. Our

architecture supports this model well. We support our partners if they want to implement our solutions using this model.

We have not seen a need to change any of our pricing models. We sell by per-seat license. Because of the low server cost of our architecture, it scales very affordably.

We see that companies want to buy a total solution from one vendor, from ACDs to applications. It minimizes complexity both from a solution standpoint and they don't have to manage multiple vendors. Support becomes easier as well.

Look for technology that supports a distributed business. You must be able to record at any location. Even if it is not a factor today, it will become so down the line. Even if you are just buying QM today look at the vendors' suite strategy and make sure they have a strong solution in terms of features and architecture. Pay attention to the features you really need and make sure the software is easy to use. More features are not always a benefit if they are not required and they add to complexity of the deployment and the end user interface. Many vendors will offer bundles of basic and advanced features, so you pay for only the features you need.

CyberTech International (www.cybertech-int.com)

Ed Kaweck, Marketing Manager, CyberTech North America

When it comes to monitoring recording solutions in this environment, it is all about cost of ownership and flexibility. Expensive packages that run on propriety hardware can no longer be justified and customers want to leverage their existing infrastructure. Enterprise customers are also looking closely at the costs to implement these solutions and prefer solutions that can be quickly deployed by in-house technical support staff.

Certainly new media is working its way into how executives acquire and share knowledge. There are numerous discussion groups on platforms such as LinkedIn and industry associations where vendor experiences are shared. As a result, I find consumers of this technology are much better educated and able to communicate their needs



more quickly. At CyberTech, we embrace new media and sponsor the industry's first RecordingWiki. This is a new media platform where the user community can collaborate and share strategies, processes and experiences around call monitoring.

The benefits of well engineered, cost effective stand alone recording/QM solutions are well documented and understood by the consumers of this technology. As more vendors embrace open standards such as SOA, incorporating point solutions onto a custom communications fabric is no longer a challenge.

The real challenge is on the part of the WFO suite providers to deliver enough value in those suites that they will compensate for the added complexity and cost that gets layered into them.

The selecting and buying best practices are all about cost of ownership, flexibility and global support. These are:

- No proprietary hardware. The recording solution and other applications must be able to run on a firm's existing/preferred server hardware. Archiving to existing storage devices must be part of the standard offering and the existing production support staff should be able to change power supplies and hard drives, and monitor solution performance
- Understand VoIP migration costs
- Select a provider that can provide support in the same markets that you operate

TelStrat (www.telstrat.com)

Kevin Smith, President

Contact centers are increasingly seeking solutions that offer quicker ROI and provide a full range of tools to help them improve customer care quality, operational efficiencies, train and retain agents, and reduce **OPEX**.

Today's tough economy has made it imperative for business to maintain market share and minimize customer churn by providing the highest level of customer service and satisfaction. High-quality contact center operations are critical to that effort, so it's still a growing market, especially for mid-size to smaller companies.

Across the board, companies are being more judicious, taking the time and putting in the effort to make sure they implement solutions that, not only are cost effective to start with, but that are scalable enough in size and capabilities to grow their contact center operation. With the degree of uncertainty in the business climate, they're best served by solutions that provide seamless **PBX** platform flexibility.

There's an ever wider array of sources for information on contact center solutions. Traditional business media and tradeshow are still a primary means to gain initial notice and product knowledge, but the Web is providing tremendous opportunities to highlight solutions, both with canned presentations and webinar-based product demos.

As to social media playing a part in product decisions, **Forrester** estimates three in four online U.S. adults use social media to connect with each other. Obviously, online communities such as LinkedIn, **Facebook**, and MySpace have tremendous reach in numbers, but their impact seems to be better directed to the consumer space rather than B2B. To be sure, Twitter is the buzz du jour and, while there may be some value in the word-of-mouth wisdom of crowds, we don't see flash mobs gathering to cut purchase orders for WFO.

These days ROI and maximizing capex impact are crucial. Companies need solutions that let them effectively meet their initial needs without burying them in unnecessary expense and complexity. They also need a solution that lets them add capabilities as their needs and organization grow. So what they really want is a modular product approach so each component can shine in a standalone role, yet seamlessly integrate with other elements of a total WFO solution suite.

We see SaaS as an emerging trend. Every day more computing applications are moving to 'the cloud'. There are trade-offs in control, security, and other areas that must be balanced with possible cost/infrastructure advantages versus resident solutions. The ideal situation is a product that offers both and that allows migration in either direction.

Too frequently such operations have a "one size fits all" attitude, because it's not cost effective to tailor operations to what are expected to be temporary situations. Contact center operations are incorporating more sophisticated capabilities such as e-learning, call automation, workforce management and other functions. Once implemented, their overall business impact makes these capabilities valuable assets. Businesses expecting to remain viable should look to retain and grow these.

Prices seem to remain consistent. What is happening is that the value received for that price is increasing. Solutions now offer high-end capabilities at mid-range prices. Virtually any size organization can now afford QM.

There is increasing demand for solutions that are simple to install, configure, and use and which provide rapid ROI. Prospective customers should look for vendors that offer online demos and product trials. The ideal solution should be available through an extensive reseller network that can provide local sales and support. If the reseller network contains major telecom vendors so much the better, as they serve as a barometer of a product's overall value and reputation.

When buying QM products do your homework. Look at solutions that do what you want now and can cost effectively grow to meet your future needs in size and added capabilities. Don't back yourself into a corner when it comes to PBX technology or platform. Check out ease of implementation and use. Get demos and/or arrange a product trial. Don't think you have to pay the high end price to get high end capabilities. Talk to the vendors. Talk to your dealer. Talk to other contact center managers. **CIS**



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May 21, 2009 • 2:00 pm ET/ 11:00 am PT

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June 17, 2009 • 10:00 pm ET/ 7:00 am PT

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Leveraging Your Communications System to Automate Your Business

Processes are what make organizations tick. If you think about it, what is an organization but a set of processes and the people who implement them? Some processes are very horizontal — they apply to many different types of organizations. In most cases, how well an organization implements its key processes plays a huge role in determining its overall success. Unfortunately, even well-run organizations often implement important processes informally, mainly relying on knowledgeable employees to make sure things run smoothly.

How can we reconcile the importance of these processes, the potential for saving money, and the lack of effort to streamline or even automate them? The answer — it's just too hard. Yes, it would be possible to hire a huge consulting company to come in, interview the key players, design a system, develop it, deploy it, and train everyone to use it. But how much would that cost? How much time would it take? How long before changing business conditions would render the whole thing obsolete? Horror stories abound regarding ambitious automation projects that were cancelled after hundreds of thousands or even millions of dollars were wasted. That's why the spreadsheet remains the most common basis for business processes today. It's cheap. It's simple. And it works — up to a point. However the inefficiency this more or less manual approach to process implementation leads to can become a drag on profitability. As the organization grows and must handle more leads, orders, returns, reviews, etc. — more people are required in order to run the processes. And as more people are layered on, the potential for expensive mistakes increases. Perhaps even worse, processes take a long time and even then are unpredictable at best. What if Fritz takes a few days off? In many cases, his work just stacks up, wasting time and untold amounts of money. So what is a business to do?

A Process Automation Platform

In some ways, the situation is analogous to the state of the world before the relational database. In the old days (the author has only read about those days), there was no easy way to store and search complex data. People kept innumerable lists. If they needed to relate an item in one list to other lists, they had to conduct time-consuming searches. But with the creation of the

relational database, everything changed. Vendors began to produce database servers ([Oracle](#), MS SQL Server, and many others) that systematized the storage and retrieval of well structured information. Now even small organizations can easily create and maintain huge collections of data and make them available to people and applications. Clearly, what's needed is a similar approach to process automation. What if an organization could deploy a single system capable of providing everything needed to easily automate just about any common process?

Now various types of process automation tools have been around for years. However, they've had three strikes against them right from the beginning. First, they're complex. They generally require extensive training and third-party implementation services. That is, don't expect your process experts to just learn the tools and use them. Second, they're expensive — not just the tools themselves, but the system integrators who need to come along to do the consulting, analysis, design, and development. Third, they don't involve people. What's that? How can a tool that purports to automate key business processes not involve people? After all, people are at the very heart of every non-trivial business process. Even more than the complexity and the expense, it's this last strike that knocks current process automation tools out of the game. You see, these current tools have no effective way of involving people because they have nothing to do with the organization's communications systems. At best (and it's not very good), they can inundate people with e-mail.

Communications-Based Process Automation

So now we've gotten to the crux of the issue. If we had a process automation engine analogous to a database server that



Dr. Donald E. Brown



were capable of intimately involving people by communicating with them in ways other than e-mail, we'd be cooking, right? Wait, isn't that exactly what some analysts and communications vendors are talking about with "communications-enabled business processes" (CEBP)? Well, not quite. You see, CEBP is just what it says — processes that are communications-enabled. When you dig into this subject more deeply, you find that it's really nothing more than allowing applications to use communications systems to kick off notifications. Certainly this falls well short of the comprehensive process automation engine we've hypothesized so far. So if CEBP is too lightweight, exactly what do we need in order to provide comprehensive process automation of the sort that organizations can actually use? Logic would suggest that what we're really talking about is communications-based process automation (CBPA). Let's parse that phrase and see what it means.

Obviously the core of what we're after is process automation. In contrast to CEBP, we're not talking about just enabling existing processes (or applications) to generate phone calls or e-mails when something interesting happens. Instead, CBPA centers on how we automate processes in the first place. It proposes that we use well established communications notions that have been in use for decades as the foundation for process automation. You see, call centers have leveraged concepts such as queuing, skills-based routing, presence, recording, real-time supervision, and many others for years in order to systematize the handling of millions of telephone calls. In fact, the same technologies have been extended in recent years to handle not only phone calls but e-mails, text chats, and other types of interactions.

Imagine being able to apply these advanced technologies to process automation. Just like customer calls, processes involve work that needs to be queued and intelligently routed to the right person. Supervisors need to be able to track in real time what's going on and who's doing what. And many processes take place in regulated industries and public companies subject to various compliance mandates. Being able to record each step in a process even to the level of screen activity is just as necessary as in a contact center. Now hopefully it's clear why communications-enabling existing processes is different from automating processes using communications-based technologies. The former is a nice but incremental improvement. The latter is revolutionary. It involves taking an entirely new approach toward process automation. And as we'll see, the benefits are many.

The Benefits of Communications-Based Process Automation

Before trying to articulate the benefits of the communications-based approach toward process automation, let's make it clear that we're not talking about taking communications

technology, adapting it for process automation, and using it separately. That approach would leave us with separate systems — communications technologies for use in the contact center and the adapted technology for use in process automation. That would certainly provide some benefit, but to really achieve the Nirvana we're after, we need to extend communications technology so that it can encompass process automation. In other words, the communications system becomes the process automation platform for the company. At first this may seem too wild to believe. The phone system runs the business? But if you think about it, it starts to make sense — especially if by "phone system" you mean an all-in-one IP communications platform complete with sophisticated contact center technology. What one system does every single employee in the organization have access to from anywhere in the world? That's right, the communications system. If we could really base process automation on the communications system, we could instantly make it available anywhere at any time to every employee. Just think of the possibilities:

- Contact center-style queuing and routing become essential for accurate and flexible distribution of multi-step workflow processes.
- Presence becomes "process presence" indicating availability for a work assignment to speed processing time.
- Recording becomes an essential part of compliance for business processes.
- Real-time supervisory monitoring provides visibility into every step of the work process including supervisory, audit, and reporting functions.
- VoIP provides complete location-independence, enabling employees to participate in businesses processes from anywhere in the world.

Where is the ROI?

This is where CBPA really becomes interesting. Far exceeding soft ROIs, based on improved personal productivity, CBPA allows the organization to minimize human latency and human error in its core business processes. If by removing latency, a process can that used to take three weeks to complete can now be completed in one; that is an ROI that is quantifiable. Now, multiply that over hundreds or thousands of employees and dozens of processes. Think about that sort of savings day after day. Consider the impact on important customers and prospects. Now you start to see the true value of CBPA in the context of unified communications. When these technologies can be employed in formal processes, they save money. That's why they've been used for many years in contact centers — because they have a hard ROI.



SPECIAL FOCUS



Interaction Process Automation – A Communications-Based Process Automation System

Interactive Intelligence has spent the last decade and a half building a comprehensive software platform for IP communications called the Interaction Center Platform. The flagship product based on this platform is called Customer Interaction Center or CIC. We've now extended the capabilities of that proven technology. The first all-in-one process automation solution comes not out of knowledge management, application development, or database technology but from the communications industry. That might seem strange at first, but when you think about it, it makes perfect sense. After all, processes are about people — even automated processes. What's needed is a structured way to help those people work together efficiently in the fulfillment of various processes. You see, process automation doesn't necessarily mean removing people from processes, but rather providing an automated means of moving work among them and making sure it gets done. The pinnacle of automation in the communications realm is the corporate contact center — and

a large portion of processes start in the contact center. Such centers involve hundreds or even thousands of people handling phone calls, e-mails, faxes, text chats, and other interactions from a wide range of customers and covering a dizzying array of topics. Over the years, contact center technology has evolved sophisticated notions of queuing, skills-based routing, quality monitoring, and real-time supervision that allow contact centers to operate with incredible precision. And the most innovative company in that demanding world, Interactive Intelligence, has built on hundreds of man-years worth of research and development to revolutionize business process automation. Interaction Process Automation is a single software solution that gives you everything you need to automate your business processes.

To download a complimentary white paper titled, "A New Approach to Business Process Automation," and learn more about the details of Interaction Process Automation, visit <http://tmcnet.com/5987.1>. **CIS**

Dr. Donald E. Brown is CEO of Interactive Intelligence, Inc.



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Do Not Call AMEX Unless You Want a Call Back

In his Communications and Technology Blog, Rich Tehrani writes:

American Express is about to change its terms of service agreement allowing them to call or SMS you on ANY number you call them from. What this means is if you borrow a friend's phone, use a pay phone or a hotel phone to call the company, they can call that number back in reference to your account for any reason. This is not to imply AMEX would divulge your confidential information but the problem here is the lack of respect for customers American Express is displaying with this move.

Moreover the utter stupidity of this change from a CRM perspective makes you wonder as an investor or customer whether you want to be associated with the company at all. BTW I am a very satisfied customer of AMEX myself and these rules won't make me cancel (yet) but they will make me wary of where I call them from.

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



Security Concerns And BPO/Contact Center Locations

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

Research firm Datamonitor recently came out with a report about Sri Lanka as a potential business process outsourcing (BPO)/offshore contact center hub. It points out that Sri Lanka shares many of the attributes that has made India such an attractive location including an affordable and a plentiful pool of educated English-speaking workers, high literacy, and a legal system that is based on a Western model. The country is wisely focusing on a few key strengths, such as accounting and finance rather than trying to be 'all things to all firms' that India's huge population can afford that nation to be.

Yet only farther down does the paper touch upon Sri Lanka's 20+ year old civil war, one like many such conflicts based on longstanding and deep-rooted issues between dominant and minority populations...after a discussion about costly telecom, doubts about cities outside its capital to support BPO/IT, and competition from other nations.

This is the wrong focus. Civil conflicts are top of media and top of mind. Because these are issues that must be addressed head on and up front in this post-9-11-01 world. For a country or region to be truly successful in drawing easily transferable BPO/IT business there must be a commitment to stability including creating and maintaining a functional society. And that means taking steps including compromises with the sides involved to resolve the issues that had led to or exacerbated to the point of violence the civil conflicts in the first place.

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

Convergys

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

Convergys Corporation has announced enhancements to its Real-Time Convergent Charging product in an effort, company officials say, to "improve scalability, reliability, and speed-to-market for communications service providers in their delivery of real-time services."

The enhanced version has pre-integrated network control capability, supports 3GPP standard network interfaces such as WIN, CAMEL, and DIAMETER and offers pre-integrated payment processing and Self-Care capability. It also uses performance improvements within Convergys Infinys Rating and Billing Manager to "improve both application scalability and total cost of ownership," company officials say.

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

By Tim Searcy



What Is In Our Best Interest?

Everywhere I turn, I hear cries of anger and frustration at greedy expressions of self interest. But where would we be without some level of self interest? Every company, government entity, non-profit group and individual has the right to pursue what they want within the confines of laws and societal norms. For this reason, I think in this period of countrywide introspection we should ask about our self interest. The question I pose is, “What is in the best interest of the contact center industry?”

Rampant, Unashamed and Vocal Optimism!

Jobs – Let’s start with the easy and the obvious. It takes very little investigation on the Internet to see that every week hundreds of new jobs are being created in the contact center industry. A search on my part looking at news from just one week found Enterprise Rent-A-Car, Verizon, ACS, Teletech, Sprint, USA 800 and Marshall&Swift announcing new hiring for June of over 1,000 new call center positions! Certainly some centers are closing, but as I tally each week, we continue to see a net increase in job opportunities.

Self-regulation – Discussions with the FTC continue to encourage me that self-regulation in partnership with the government is a real possibility. Beyond the ability to accredit contact centers and provide them with a seal of compliance, self-regulation is about understanding the ongoing needs of consumers and regulators. We know that regulatory interest is not going to be eliminated by our efforts. However, the encouragement we take away from every meeting with regulatory personnel is that we are on the inside working in cooperation as opposed to outside as a target of scorn and punitive designs.

Balance

Right delivery for the right problem – Offshore nor automated voice nor at home workers nor self-service on the Web are panacean solutions. It is in our customers’ best interest for the industry to properly balance the delivery of communication. Short-term inexpensive message delivery does not equate to long-term profit. Companies must take a hard look at which applications make sense to be conducted using automated voice, self-directed service, offshore agents, or domestic live operators. The concept of “right sourcing” applies to more than the location of the center; it is the means of contact as well.

Consumer interests and business practices – The first thing marketing people learn to do is to separate themselves from the target audience. In essence, don’t write the message as though you are the buyer, because rarely are you the target. This is not true in customer service. We are all customers with similar problems, issues and complaints. You can legitimately put yourself in the shoes of the person placing the call and determine what the right treatment for that prospect should be. If it does not feel right to you, then it is not right for them.

State and federal roles – Attorneys General from different states have been concerned about the American Teleservices Association’s request of the FCC for a declaratory ruling on exclusive jurisdiction. Clearly, we need to do a better job of explaining our position. The Association believes that states have a legitimate role in regulating calls initiated and terminating within their borders. Additionally, states are uniquely positioned to provide enforcement to federal officials. However, the federal government also has a legitimate role to create laws and standards impacting calls which cross state lines. These roles need to be balanced and definitively declared.

Involvement

Associations – Unfortunately, recent economic realities have negatively impacted many of the trade groups we all rely on to communicate our message in Washington, DC. The ATA has been experiencing an unprecedented level of growth, which has been gratifying. However, I can tell you as the only voice left to carry your message, the ATA needs your participation so we can be loud enough to overcome our detractors. Get involved in supporting the call center industry at www.ataconnect.org!

Education & Industry partnerships – Many of you have recently experienced staff cuts in your management ranks. Although production positions in teleservices have been strong, often the first line of management has not been so lucky. When it comes time to rebuild the ranks of your management team, strongly consider those college graduates with degrees in direct or internet marketing. Customer Interactions Solutions has profiled the Taylor Institute at the University of Akron in the past, and that is a great place to start. Additionally, if you will visit this publication’s Web site at www.cismag.com, there are a large number of educational institutions offering degrees in our field. Support this industry by supporting the educational process, which will be the underpinning for the future of what we do.

Let us not vilify self-interest, but rather express our own. As a group of over 5.3 million employees representing a significant portion of the economy, we have as much right to defend our rightful place in the public discourse as anyone. Best of all, our interests align with the country’s interest for economic prosperity and a fair playing field. If you want to share your thoughts on our interests, please contact me at tim@ataconnect.org. **CIS**



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The Mobile CRM Convergence Blame the Smartphones

This incredibly user-friendly smartphone has captured the North American public's imagination and their wallets into the realm of mobile multimedia customer interactions. It has pushed competitors to make their handsets more user-friendly and functional.

Blame too the suppliers who are developing new user-friendly applications that are enabling their workforces and consumers to more fully utilize the wireless channel. These complete a virtuous circle that will prompt even more wireless use.

Blame also the expansion of 3G and faster networks and more competitive rates. Wireless has become so feasible and cost-effective that more households are dropping their landlines and that some businesses are not buying or are doing away with bulky laptops. Why have multiple boxes, phones, and connections when one multichannel go-anywhere device does it all?

The faster speeds are prompting more firms and users to deploy and enable browsers to access consumer and work applications in realtime via the web, observes Angie Hirata, worldwide director of marketing and business development, Maximizer Software. More websites are becoming optimized for mobile users while instead of mobile-only browsers more devices now have full browsers that can render desktop applications, adds Vidya Drego, Senior Analyst, [Forrester](#). Full browsing she says makes searches faster and easier.

Martin Schneider, director of product marketing, [SugarCRM](#) says that in turn mobile browsers have sufficiently matured to enable bandwidth-intensive consumer activities like e-mail and view [YouTube](#) on iPhones and FLASH animations and JPEG files as on fixed computers. That bodes well for business applications which tend to but not always smaller: the exceptions being graphics-heavy fields such as media/entertainment.

"These innovations open the floodgates to anything you can do on a fixed desktop or laptop computer you can do on a mobile browser," says Schneider.

He has also seen mobile applications grow from a very limited set of uses such as warehouse and inventory RFID-enabled devices and management tools to mobile applications that are fully functional subsets of their parent solutions. Mobile CRM is no longer a separate tool anymore.

Whatever the causes, there appears to be a convergence of CRM between mobile and fixed environments. That it will no longer matter where the workers and customers are located to enable their tasks and interactions effectively.

"The environment is not either mobile or fixed location CRM anymore," explains Schneider. "It is becoming CRM whenever you want it, wherever you want it, however you want to experience and use these applications and you as an enterprise are only managing one experience."

Smarter Apps

There are more versatile and user-friendly mobile CRM and related applications on the market and in the works that equal or surpass fixed solutions in their performance. Maximizer's new Maximizer CRM 10.5 Freedom for [BlackBerry](#) smartphones enabling one-click, one-touch access to customer and sales information. It offers real-time wireless access to business information through a mobile dashboard, which allows executives to monitor sales performance and service activities from their mobile devices.



Virtual Hold Technology's MobileConnect callback solution helps companies identify their buyers—the linchpin of CRM—before making the calls. It is connected to customers' cell numbers which may be referenced in order to pull up individual account data prior to the calls. Virtual Hold will down the road offer a visual IVR built into the smartphone interface. This will allow customers to select specific departments and to submit additional personal identifiers such as account numbers and passwords ahead of time so that companies can easily identify them and their needs before calling them back.

Bernard Drost, Chief Technology Officer, [Innoveer](#) sees a set of business apps that he thinks has considerable potential: linking mobile workers to available nearby resources instead of having to find them in the field or going back to the office to place orders. The way these work is this: a field service rep is called out to a customer's home to fix a water heater only to find out that a part that needs replacing is that not their toolkit or truck. The rep puts the name of the piece into their smartphone and it finds the nearest distributor.

"With such mobile apps there is increased customer satisfaction because of faster service and first visit resolution plus the firm comes off as more professional because did what it took to get the job done," explains Drost. "The solutions also boost efficiencies and lower costs through less running around resulting in lower labor, fuel, vehicle wear and tear, and avoided shipping costs."

Mobile presence and connectivity

There are new presence/unified communications (UC) applications that are breaking



down the walls between fixed and mobile environments in both consumer and business marketing and support.

Alcatel-Lucent's OmniTouch 8400 ICS provides to smartphones full support for enterprise telephony features, presence, instant messaging, comprehensive directory search, call log, dual-mode cellular/Wi-Fi connectivity with seamless handoff. The firm says users can enjoy the same high-quality collaboration experience, whether they are communicating over phone, desktop PC, laptop...or smartphone.

Zeacom's new Zeacom Communications Center 5.0 Executive Mobile solution provides the same presence functionality on Blackberry and Windows Mobile devices as on desktops. Ernie Wallerstein, Zeacom president, Americas uses an example of a call coming into the contact center from a customer who is upset because their product is not working the way it is sold to them to illustrate how integrated mobile presence works.

"The agent in the center that does not have presence would take that customer's information, hang the up phone, get in touch with sales rep, talk to that rep, and calls that customer back," says Wallerstein. "The one that is in a center that has presence could see the availability of the sales rep who sold that account or the sales engineer who was involved, they can conference in all parties, and resolve the issues to everyone's satisfaction in realtime."

There are new tools that extend to wireless devices the same contact center functions that are available on fixed desktops. CosmoCom's Cosmo Call Universe version 6 (CCU 6) features CosmoGo(tm), a new smartphone application that delivers ACD, CTI, inquiry and transaction enablement for recurring subjects, and tracking and reporting, all via a 2.5G or higher network.

"CosmoGo enables complete CRM anytime, anywhere, by connecting highly valued customers directly to account or sales reps, knowledge workers, and subject matter experts whenever they are," explains executive vice president

Steve Kowarsky. "Before CosmoGo, all of these benefits were only available to people who were tied to a desk with a computer and a wired phone."

Core CRM Apps Mobile-Optimized

The standard method of providing CRM tools to mobile users has been deploying mobile-specialized premise-based applications with stripped-down thin-clients, and data, on the devices. The key benefits are that there are many excellent and proven solutions on the market and that the data remains there during loss of signal, enabling work with minimal disruption.

Some suppliers such as SugarCRM are deploying another new method: 'smarthosting': placing standard CRM applications entirely in hosted environments and optimizing access for mobile users. Smarthosting identifies mobile users and connects them to templates that enable them to carry out their work on the core platforms. The data is kept and accessed on the hosted platform. This delivery method minimizes mobile bandwidth requirements without compromising the integrity and functionality for fixed sites or requiring separate solutions.

Smarthosting is also more secure. By having the data resident on the host rather than on the device there is much less risk of having both the information and the applications ending up literally in the wrong hands either accidentally or deliberately.

SugarCRM is making its smarthosted solution more versatile. It will soon come out with Sugar 5.5 that will permit you to make custom applications you had developed with Module Builder for wired-in desktops and laptops available in your mobile. You can do this for existing Sugar applications that come with it.

"With 'smarthosting' you are getting a mobile optimized, not shrunk version of CRM system," explains Schneider. "You are not separating your data sets, not trying to push 'lite' version, you are accessing applications on the server level. You are there when you are connected, you can synch your devices and

so can others on your team. It removes headaches on data quality persistency when you are calling the server instead of using a smaller version of the database and then synching every couple of hours. And it gives peace of mind securitywise."

The one key downside with smarthosting is data unavailability during signal loss. SugarCRM manages this issue through its rich HTML client that is always connected to the server if they are accessing the application, therefore no data synching is needed, and no data will be lost. Innoveer's Drost says the only way to accomplish productive work is to store what individuals need on the devices. This can be done with local encrypted databases or possibly through encrypted cookies/files.

Salesforce.com offers a hybrid mobile solution that combines a flexible native client for offline data access with a fully customizable, browser-based user interface for use while connected to the Internet. The client connects to the Salesforce CRM Cloud through a configurable mobile data management layer.

"This product combines the speed and power of offline data access with the flexibility and rapid development of browser-based interfaces," says Chuck Dietrich Vice President, Salesforce Mobile. **CIS**

The following companies participated in the preparation of this article:

Alcatel-Lucent
www.alcatel-lucent.com

CosmoCom
www.cosmocom.com

Innoveer
www.innoveer.com

Maximizer Software
www.maximizer.com

Salesforce.com
www.salesforce.com

SugarCRM
www.sugarcrm.com

Virtual Hold Technology
www.virtualhold.com

Zeacom
www.zeacom.com



Supplier Survey: Headsets

This month's Supplier Survey is focusing on headsets. Here are the highlights of their responses to questions posed on market, product, and vendor trends, and on buying advice. The full texts will appear on TMCnet.com.



Here are the questions covered here:

1. What top trends do you see happening in both contact centers and in your industry and what is driving these trends? For example are companies delaying replacing and upgrading headsets? What is their typical lifespan and how much if any are these being lengthened?
2. What new products, services, and/or enhancements to your existing solutions have you developed, or perhaps are currently working on in response to these issues, and how will they help contact centers improve their performance?
3. Where does your firm fit in your marketplace? What are your core differentiators? How would you describe your view of the future evolution of the company? Have you recently or do you plan to enter new markets and if which ones, why, and through what means?
4. Discuss the state of technology with headsets. For example are the days of wired sets numbered and if so why?
5. There are new mobile applications that give agents the same connectivity: ACD routing, access to applications on their wireless devices as being at their desks. These solutions are being aimed at higher-end staff, like level 3 support reps and supervisors. What impact will these have on traditional desktop/headset environments and on the demand for wireless headsets?
6. What shape do you see contact centers and your industry going forward? Where are the growth markets? What do you see happening post-downturn?

GN Netcom (www.gnnetcom.com)

David Grazio, Director of Channel Marketing, CC&O

We are seeing:

- More integration with other communication devices and solutions through initiatives like unified communi-

cations to improve worker efficiency and productivity across the organization

- Minimize costs and increase ROI for current communication solutions to delay or postpone new headset purchases until economic conditions improve to justify new investments
- More employees interested in experiencing hands free communication by transitioning seamlessly between devices both within and outside of the office (desk phone, soft phone, cell, PDA)

We are working on:

- New high end corded solutions being introduced that fit within 'advanced superior' category of headsets developed to improve ROI by providing users with better audio performance, comfort features, and design enhancements to withstand contact center environments
- Enabling customers to delay purchase of replacement headsets by providing a 3 year warranty combined with superior components/materials that allow users to hear better and thus be able to work more efficiently in contact center environments. This gives customers better investment protection with three years of parts and labor coverage standard combined with our product support
- New 'advanced superior' wireless headsets that enable users to experience the ultimate in hands free communications with maximum talk time, roaming distance, user friendly interface and controls, along with multiple device support 'out of the box' to ensure compatibility and minimize downtime for business calls and discussions

We are an industry leader within the contact center marketplace providing proven wired headset solutions that enable customers to hear better, choose from multiple wearing style



options to maximize comfort, and provide award-winning performance, quality and reliability with each connection.

Key differentiators include: **Jabra** product quality and reliability with our rigorous product testing procedures, advanced performance to provide maximum talk time, durability to withstand the toughest of call center environments, industry leading product support resulting in guaranteed customer satisfaction, along with proven performance via recognition and validation through industry awards and customer success stories

There is more emphasis and focus on enhancements in the areas of voice clarity with our ultra noise cancelling microphone, headset durability, comfort, and compatibility through our strategic alliances with Microsoft, Cisco, IBM, Avaya, and Polycom. Also the introduction of multiuse headsets such as the M5390 which allow users to connect seamlessly to multiple devices such as cell phone, desk or soft phone, and PC (USB).

There is also the need for advanced wired headsets that are designed to withstand rigorous call center environments, deliver maximum comfort and talk time, provide a secure environment for conversations, compatibility to support existing communication systems, and reduce the total cost of ownership. This last point is very critical given high employee turnover in contact centers.

For mobile applications the demand for wireless and multiuse headsets will increase as users are looking for solutions that enable them to seamlessly communicate back and forth between devices while maintaining acceptable service level agreements for their customers. For wired headsets customers will continue to leverage these solutions for users that require more durability and performance within a secure environment with noise cancelling capabilities given sound restrictions.

For the contact center marketplace we're seeing an increase in the number of agent positions overall for the medium-large contact centers as more companies are outsourcing their customer service teams to manage service level agreements and provide a positive user experience each time.

The largest capital expenditures for technology purchases are expected in the telecommunications sector along with financial services industry covering credit unions, banking, and stock market/broker institutions. The goal is achieving maximum penetration within the contact center marketplace so growth opportunities will be limited to replacement of existing wired headsets with unified communications (UC)/soft phone compatible headsets. The primary drivers for new headset purchases will revolve around benefits of multitasking, mobility, comfort, growth of soft phones and UC clients, migration to IP telephony systems within contact centers.

Plantronics (www.plantronics.com)

Nicholas Eisner, Global Product Manager, Corded Professional Products

The main focus has become doing more with less - making the most of every customer contact, retaining agents, and improving customer satisfaction and retention. We are seeing little decline in contact center sales compared to other more discretionary purchases, customer contact being the mission-critical customer touch vehicle for most companies. Replacement purchases are being deferred as much as is operationally tenable, and therein our customers enjoy advantage due to the robustness and longevity of our solutions.

New technologies enable Plantronics to continue its long history of improving comfort, intelligibility and efficiency in the contact center. Our newest digital audio processor significantly improves intelligibility, allowing for better customer service, shorter, more concise conversations, and less agent fatigue. Our SupraPlus Wireless, the only purpose-built contact center wireless headset, provides new levels of quality, convenience and mobility. Most notably, we are introducing a SIP-based VoIP headset endpoint which does away with the costly and complex IP deskphone but still protects the voice path from the PC environment.

Plantronics, basing its value on sound innovation, reliability, superior comfort and proven service/support, has more headset systems in more contact centers than any other vendor. Major investment in digital signal processing (DSP) is allowing for ever-clearer conversations, leading to ever-happier customers. Open standards driven by UC place responsibility on the endpoint for the clarity of the signal, playing to Plantronics' past and future strengths.

There will always be a market for corded headset systems in the contact center for several reasons:

- Corded headset systems are inherently clearer than wireless
- Corded headset systems are inherently less expensive than wireless
- Corded headset systems do not face the density limits of wireless.

However, where wireless is applicable, either exclusively for supervisors, or for centers with fewer than several hundred agents, the freedom to roam outweighs any audio shortcomings.

Plantronics believes that IP telephony will have the biggest technology impact, with increasing numbers of calls being routed over Ethernet. While some contact centers will allow processing of the voice signal by a PC, others will insist on a dedicated SIP end-point headset system for robustness. Plantronics will offer all those solutions and more.



The mobile staff scenario, with agents having ACD routing to applications on their wireless devices as being at their desks, is common in the Scandinavian countries, and we do see it becoming more widely adopted. RF density limitations, particularly if Bluetooth devices are used, will continue to gate such strategies in very large centers. Plantronics will continue to offer a broad array of solutions making sophisticated, hybrid environments possible.

Fast, friendly and efficient customer service will always be required, and are a key competitive differentiator during economic downturns. As rote questions are answered online we expect agents to be handling increasingly complex queries. We have seen particular strength in the financial services sector as customers increase their information requirements. Our global presence allows us to benefit from countries and regions that are enjoying greater economic strength. Plantronics is using this period to invest heavily in our new products and technologies, preparing us to be strong out of the gate as the economy rebounds.

Sennheiser Electronic Corp. (www.sennheiserusa.com)
William J. Whearty Vice President, Sales Consumer Electronics, Telecommunications and Audiology

We have seen a reduction in wholesale exchange of headsets in call centers of all sizes. Customers are extending the life of older inventory that may have been discarded or used as a trade in prior to this economic cycle. Sennheiser expects a four to five year life for a headset under normal usage.

We have created new wireless products and will release additional wireless products for use in small offices through large call centers. We will be releasing new mobile products in 2009 to address the demands of mobile customers. We create these products in conjunction with market feedback from consumers, manufacturers, and our dealers. We have upgraded several of our most popular call center headsets to improve the durability of products many customers agree are already the most durable available.

Sennheiser products are uniquely positioned to fill those needs due to our durability, outstanding noise canceling microphones, and receive sound quality. Customers should always measure the cost to own a headset; it is far higher than the cost to buy. As an example, if you buy a low priced headset that has poor noise canceling performance, your agents will spend more time repeating themselves to their customers. That means that the call center will be louder due to the other agents trying to compensate so that their customers can hear them, and inevitably reducing customer satisfaction while increasing costs. After many years in this business, I have found that people that believe all headsets are the same: usually learn a valuable lesson to late.

Sennheiser Communications is seen as the premium product in the space. We are still fairly new to the market, having delivered our first products in December 2003. We quickly grew to an estimated #3 market share position, and despite the economic challenges, managed to grow our telecommunications business organically in 2008, a testament to our products in a market that saw the majority of our competitors decline.

Our strengths continue to be durability, sound quality, safety, comfort, and innovation. We will continue to add products and pursue the mobile market, office wireless, PC gaming, as well as develop product for call center applications across all spectrums. The Sennheiser dealer and distributor network is large, not all carry our telecommunications products, but the access to the consumer and corporate markets is in place for the right products.

A call center headset has to do a few things well; provide clear voice transmission and receive quality, be comfortable for long periods of time, safeguard the user from acoustic spikes, and be durable. Nothing wastes time like a call center employee walking around with a broken headset.

We make a great headset, and we will continue to invest in call center wired headsets, we don't see that segment declining, especially as call centers that were outsourced to other countries come back to the U.S. We do see more wireless units going into traditional call centers, but those are generally for managers. The market that most headset manufacturers wants to penetrate is the office worker, the person that spends time on the phone, but does not see themselves wearing a headset. That person, once they understand how much more productive they can be working hands free, typically wants a wireless, sleek and comfortable, with extended range so that they can get up and move and do tasks such as get a file.

We certainly see some short term declines in select markets, such as the financial sector for call center products, however, even within banks there is some demand as banks add staff to handle defaults and troubled consumers. The contact center market will continue to be a steady one for us in the long term as we continue to gain market share. The highest growth we target is office wireless, followed by PC products for gaming and internet telephony and video, followed by traditional wired headsets. Post downturn, we see pent up demand for new products and applications, we feel we will be well positioned to serve that demand as our development teams have never slowed during these recent times. We continue to invest in the markets and products we predict will grow now and in the future. **CIS**



Customer Interaction Solutions' 10th Annual CRM Excellence awards, Part 1

For the tenth consecutive year, the editors of Customer Interaction Solutions dared readers to prove that their companies have what it takes to win the coveted CRM Excellence Award. Below is Part One of the winners list — the companies that offer the best and the brightest customer relationship management products and services, all to the benefit of their clients. Winners were chosen on hard data: quantifiable results that convinced us, without a doubt, their clients were infinitely better off with these companies' products and services than without.



Congratulations to the winners!

EDITOR'S NOTE: Because of the very large volume of award applications we received, the CRM Excellence Award winners

will be presented in two parts; Part Two will appear in the June 2008 issue of Customer Interaction Solutions. More information about winning companies and their products and services may be found at www.tmcnet.com

Allegiance Inc.

www.allegiance.com
Allegiance Engage platform

Alloy Software, Inc.

www.alloy-software.com
Alloy Navigator

Altitude Software

www.altitude.com
Altitude Unified Desktop

AMC Technology, LLC

www.amctechnology.com
AMC Application Adapter for Microsoft Dynamics CRM

Aplicor Inc.

www.aplicor.com
Aplicor Enterprise

Chordiant Software, Inc.

www.chordiant.com
Chordiant Customer Experience (Cx)

Citrix Online

www.citrixonline.com
Citrix GoToAssist Corporate

Consona Corporation

www.consona.com
Consona CRM Suite (formerly Onyx and KNOVA)

Cross Country Automotive Services

www.crosscountry-auto.com
Instant Dispatch

eglue

www.eglue.com
eglue InterAct Suite

Envision

www.envisioninc.com
Envision Centricity

Epicor

www.epicor.com
Epicor CRM

eTelecare Global Solutions

www.etelecare.com
Save Desk

Five9, Inc.

www.five9.com
Five9 Virtual Call Center Suite

inContact

www.incontact.com
inContact

Intelenet Global Services Pvt. Ltd

www.intelenetglobal.com
Intelenet's CRM solution for a leading telecom client

InVision Software

www.invisionwfm.com
InVision Enterprise WFM

Knoa Software

www.knoa.com
Knoa Experience and Performance Manager 5.0

LiveOps

www.liveops.com
LiveOps On-Demand Call Center Platform



S(L)IPping IP Into The Contact Center

Internet telephony (IP) is gradually becoming the new norm in contact center communications. The new switching solutions that are being deployed, say observers, are either all-IP or are hybrid IP-TDM that leverages existing investments; very few are now TDM-only.



While the economic downturn has held up many planned IP projects because of budget constraints, there are now signs that some of these may be going ahead. Eric LeBow, Vice President of Business Transformation, [Spanlink](#) Communications, has been seeing since late February a stronger uptake in proposals from primarily existing clients for IP in bricks-and-mortar centers and increasingly to support home-based agents. One recent project will have Spanlink put in one to enable 100 new home agents in Utah.

"Companies are looking at their capital budgets and are asking themselves 'what investments are we going to make in 2009 and 2010,'" explains LeBow. "Many are figuring out that going to IP will enable them to achieve a substantial ROI both short-and long-term."

IP Drivers

The drivers behind the move to IP continue to be cost savings along with greater flexibility. Don Greco, director of contact center field marketing and sales, [Siemens](#) Enterprise Communications points to Forrester and IDC estimates of 15 percent or more compared with TDM. Siemens makes the IP-based OpenScape Unified Communications (UC) Server that includes enterprise grade voice with carrier grade scalability and reliability, IP least cost routing, video conferencing, and UC applications.

IP achieves these results by eliminating separate voice networks including switches and cabling, and management. There are also reduced network management fees and lowered carrier fees.

[Verizon](#) Business has made IP deployment even more economical. The latest release of its Hosted IP Centrex solution offers Burstable Enterprise Shared Trunks (BEST). BEST, previously only available with [Verizon's](#) IP Trunking allows clients to use idle VoIP capacity in one location to accommodate an increase in traffic from another.

IP solutions, especially those that are hosted, makes meshing contact centers acquired in a merger/acquisition much easier and less expensive; there are no legacy switches to rip/replace. The applications can be connected directly to desktops or indirectly via gateways to existing TDM hardware.

IP makes working with multiple channels: e-mail, chat, web form, and social networking more effective as all of these applications can be blended into a single stream. This gives improved interaction consistency and better service. It delivers presence/UC to sales staff and subject matter experts, and enables informal agents such as in bank branches, much more seamlessly because the channels are in the same pipe.

These benefits are coming together in home agent deployment, which is growing in popularity. The cost savings, channel integration, and presence/UC connectivity to offices, teams, and supervisors make home working more feasible. Home-based contact centers provide net gains of \$10,000 to \$20,000 per agent/year according to The Telework Coalition through shrinking facilities costs and obtaining higher productivity by recruiting and retaining higher quality staff.

IP also meshes with another emerging trend: voice architecture centralization with minimal redundancy just as there is with data. Instead of ACDs: TDM or IP in each of 10 contact centers networked together there are 1 or 2 IP ACD servers. One server would carry most of the load with the other as a backup for spikes and redundancy, or handle satellite offices or home agents: which is how data is architected. The benefits are lowered capital and operating costs and improved customer service by being able to optimize the network better through more easily supporting virtualized queues across different sites.

"The location-independent nature of IP is much more technically suited for this centralized architecture than TDM," explains Drew Kraus, Research Vice President, [Gartner](#), who is seeing his clients move in this direction.

SIP: The ROI-powered IP engine

If costs and flexibility are driving contact centers to IP then session initiation protocol (SIP) is the engine. SIP is an open standards-based TCP/IP application signaling protocol. It is gradually displacing H.323, which is an older protocol used to deliver voice over an IP network.



SIP has several advantages over H.323, including scalability, ease of integration, and ease of management; Spanlink's LeBow points out. This leads to lower overall total cost of ownership.

SIP has also helped lower product costs because it has made the components more interoperable through the common standard. Tom Fisher, Director of Systems Engineering for Interactive Intelligence points to an IP endpoint written to H.323 in 2001 that sold for \$900, which has been superseded by one done in SIP in 2008 for \$120.

"There is now a hard dollar ROI model for IP thanks in part to SIP that is at the least cost-neutral but more likely cost-beneficial for IT departments to take to their business decisionmakers," says Fisher. "While there has always been an ROI before the widespread use of SIP, the amount was not as great and the investments were more difficult to justify because the purchase and installation costs were higher. With SIP today we now have a perfect confluence of both cost-savings and productivity gains."

In tandem, SIP trunking can cut costs and improve integration between multiple contact centers, and connectivity to satellite offices, informal contact centers, and home-based agents by treating voice as data. With SIP trunking inbound calls are routed to the nearest IP point of presence. Those that are TDM such as PSTN or cellular are converted to IP at network-owned gateways; those that are IP originated such over cable, DSL, or wireless satellite broadband are flowed through.

CosmoCom, which makes IP-SIP-based contact center platforms, has considerable experience with SIP trunking through its sales engineering and support for its enterprise client base. It recently launched CosmoCall Universe 6, which has an array of new features including connectivity to mobile staff, informal agents, and off-ACD business users, and virtual outbound dialing.

"SIP trunking has become much more of a mainstream product," explains Steve Kowarsky, executive vice president, CosmoCom. "The benefits come from keeping communications in the IP domain. If you bring in SIP trunks, then you are bringing IP right into your IP network. You can use your own IP network for transport, or you can extend the reach via the public Internet. Since it comes in as IP and moves around as IP, you maximize the cost benefits of using IP as the transport layer, and you eliminate the costs associated with media gateways."

IP-based solutions combined with SIP trunking connecting into contact centers can pay off especially for small/mid-sized firms. Payworks Payroll Services deployed [Objectworld's](#) SIP-based UC server in December 2008 to connect 100 employees across three locations, and the solution is well underway to save it up to \$52,000 per year.

Here's where the dollars add up. Payworks estimates that Objectworld's solution will enable it to cut \$36,000/year in contact center expenses by doing away with having to support another

vendors' application; the contact center is included in the Objectworld product. Going to Objectworld will save it \$16,000/year on long distance charges by calls going over SIP trunking.

[Aspect](#), which makes SIP-based contact handling solutions, is beginning to see these benefits internally. It has successfully rolled out Microsoft Office Communications Server 2007 R2 for voice and voicemail, audio and web conferencing, IM, and presence at its Chelmsford, Mass. headquarters and is expanding the deployment companywide.

"The best part is the cost benefits we'll be able to see as a result of the implementation, including saving \$75,000 per month on conference calling in the first year alone," says Jamie Ryan, Aspect's senior vice president, Information Technology and CIO. "Both local and long distance costs will drop significantly as a result of our use of SIP trunking and will result in additional savings of hundreds of thousands of dollars as we complete our deployment. With these types of savings, our ROI will be extremely aggressive."

S(IP) Challenges, and Solutions

While SIP has become widely adopted there are still some challenges in making SIP/IP functional on the same scale as TDM. One of them is that interoperability is from universal.

"If SIP was a universal language for all those phones out there we would talk directly to that extension and tell it what to do," adds Ernie Wallerstein, President, Americas, [Zeamcom](#). "But it doesn't work that way. You can't tell it to go off-hook without talking to the [PBX](#), and that language and dialect is different for every manufacturer SIP or H.323-based."

As a newer protocol, SIP is less mature, which can require more light to medium integration work between different manufacturers' SIP-based products, explains Spanlink's LeBow. Many manufacturers he says have their own SIP versions; many solutions require SIP and proprietary H.323 hybrid integrations.

To enable connectivity, most manufacturers support multiple protocols, including both SIP and H.323. Some manufacturers, like [Cisco](#), publish their SIP standards and allow third parties, like Spanlink, to develop applications and perform integrations.

"The interoperability issues are not insurmountable and while the integration is not as hard as it used to be, SIP is still not plug-and-play," says LeBow.

There are still lingering concerns over quality of service (QoS): latency, jitter, and dropped calls with S(IP). Yet these are gradually becoming rectified through higher quality solutions, more bandwidth, network management, and SIP trunking; unlike long-established TDM, the young SIP/IP technology is still not 'install and forget' like the latter.

Firms can control QoS through packet prioritization and by limiting extraneous bandwidth-eating applications on the



network. For example Aspect prohibits users from having non-work-related web-based applications that frequently access information, such as RSS feeds.

The QoS concerns are still the most acute at the home agent level. Their offices usually lie beyond the SIP trunking carriers' points of presence and management, on connections that could be DSL or cable or in some cases wireless. Carriers can therefore not guarantee total end to end QoS.

Many of these issues have been ameliorated though with increasing bandwidth, by technology improvements, and by setting 'last mile' standards for home agents. For example Convergys requires its home agent applicants to have minimum speeds of 500 kbps up and 1.5 mbps down. It does not allow satellite or wireless broadband access. It also asks candidate agents to test their VoIP quality through their PCs.

There are also tools to manage QoS at the home level by prioritizing incoming and outgoing traffic to support IP. Cisco's sophisticated Cisco Virtual Office offering provides a comprehensive IP-based multichannel communications solution for branch and home workers. It packages routing, switching, security, wireless, IP telephony, and policy control technology into a centrally managed office-caliber solution that provides highly secure video, voice, data and wireless service. Cisco's solutions can throttle data packet and permit quality voice.

"For just having home agents them plug their IP phones into modems or routers supplied by their providers is probably not enough for high-reliability high-security, voice interactions," explains Ross Daniels, Cisco Director, UC Solutions Marketing.

Perhaps the most important challenge in today's climate is available and limited resources. While the business case is there for IP/SIP, contact center expenditures must stand in line nonetheless with other corporate needs. IP deployments require for example having the infrastructure move to it. For those reasons many contact centers that have TDM installations that are still effectively carrying out functions such as routing calls to agents' desktops have or are considering hybrid solutions that enable them to phase into IP.

"For companies had figured out what the costs are and had this in spending in pipeline they are continuing with that evolutionary transition," says Datamonitor's Jacobs. "For companies have done the piloting and that is the great thing you can do with IP is that you can pilot with branch offices or remote agents, they will keep those hybrid deployments live without transitioning the whole infrastructure to IP."

Avaya's new Aura SIP-based platform integration architecture enables signaling interconnect with the TDM PBXes through having its SIP gateway next to them. Calls come into the PBX and Aura takes them to agents' desktops and out to multiple site including to satellite offices and home agents.

More importantly Aura integrates well with the new channels for customer service and loyalty. Using this functionality, enterprises can securely incorporate social media such as Facebook and Twitter, text messaging, and peer-to-peer communications. For example, a communications session could be augmented with a social network profile on the participants. This feature would provide more context than is available with Caller ID and presence and could therefore boost the outcome and value of these engagements. Similarly, widgets to social network home pages can be added to facilitate realtime communications and enrich interactions with customers.

Another seemingly more radical option is hosted IP platforms. There are a growing array of firms, such as [LiveOps](#) and [Transera](#) that provide IP-based call/contact routing and outbound calling, reports Ian Jacobs, senior analyst, [Datamonitor](#).

The benefits of this choice are no new infrastructure to install and integrate and immense flexibility to add seats, such as home agents, and sites, like retail informal centers. The downsides are increased customization for more sophisticated environments.

"It makes sense to go hosted in this economic environment," says Jacobs. "If you have to build contact center from scratch, greatly expand, rationalize multiple sites into one, which has been happening, the hosted model makes a lot of sense."

He is seeing demand increase for hosted IP platforms not only for the above reasons but also because there is greater organizational acceptance of and more importantly support for hosting as an alternative delivery model i.e. opex instead of capex.

"Salesforce.com has been evangelizing at corporate level for the hosted model, that you don't have to own the solution," says Jacobs. "They see the benefit of on-demand in one part of the enterprise and are wondering why they cannot have the same benefits in other parts, such as the contact center. Then you will see hosted voice spiral out into the enterprise application world and eventually become the norm." **CIS**

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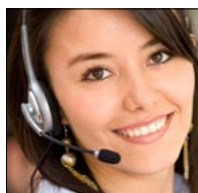
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Brendan B. Read,
SENIOR CONTRIBUTING EDITOR



Needed: A Contact Center Makeover?

Contact centers have seemed to have weathered the economic downturn better than most sectors. The opening of new locations and the hiring of more agents both for them and for at-home work are bright spots in an otherwise dismal picture.

These are also excellent times for contact centers to expand. Retailer closures have created great inventories of customer-service-skilled people and modern, well-situated buildings. The financial services industry meltdown has led to similar opportunities, including vacant contact centers.

Unfortunately, if reports are accurate, contact center staff turnover appears to be higher than one would expect in today's environment. Even in communities where better-paid employers have been cutting back, contact centers often must aggressively recruit employees. In at least one Canadian city some of them have placed portable billboards near the entrances of the other sites to lure agents.

And where communities are prosperous, contact centers seem to lose out. One large teleservices firm had to close its center in a Midwestern city because it could not find enough workers to fill open positions.

At the same time the contact center work has become more complex and demanding. Today's agents must communicate effectively, intelligently, and professionally in voice and in text and think on their feet to quickly meet customers' needs to their satisfaction. Some firms, like Verizon Wireless, now require applicants to have college educations. Yet when positions require more skills and prerequisites this shrinks the applicant pools.

If your contact center is facing these issues perhaps this is the occasion for a makeover.

A good hard look at why you cannot attract and retain the quality people you need followed by taking steps to fix the problem areas.

The first place to examine is supervision and management. Staffing experts and experienced managers agree that the top reason why employees voluntarily leave their employers is because they work underneath terrible supervisors. These are individuals who blow up out of proportion minor matters rather than focus on the critical issues, and who coach by berating staff as opposed to employing constructive criticism and showing better ways of accomplishing tasks.

The chief culprit is the age-old management mistake of promoting the best line workers without any examination of whether they have the aptitude and skills to lead and supervise colleagues. Then again those choices are made by managers who themselves should not be in those roles, which perpetuates this cycle of incompetence.

Yes, other service jobs like in retail and hospitality have the same bad turnover and supervision issues. Yet their environments make these often nasty situations a little more tolerable. Clerks and waiters can actually walk away and focus on customers whereas agents face harassment every second by their supervisors, over multiple channels, and with nowhere to run.

A second trouble spot is lack of staff empowerment and flexibility. Most agents want to help those they are communicating with--doing so gives them tremendous satisfaction--but they get frustrated when they are tied down by bureaucratic red tape and procedures. And in today's world employees want and expect workplaces that work with instead of against their lives. That means enabling them to change and trade shifts, giving them flexible hours, accommodating child and eldercare, and allowing them to work from home.

A third blotch is no community identity. In-house contact centers almost always rank higher than teleservices firms with potential hires because they have names and corporate images that they can wear as badges. Yet in all too few cases do teleservices companies have similar positive identities that their staff can be proud of. Moreover, not enough of these firms make themselves parts of their host communities such as by participating in charity or school fundraising, supporting local amateur sports teams, and in joining events such as holiday festivities.

Little wonder that elected officials have been able to successfully target teleservices with restrictive laws. Out of sight, out of...

There is no reason why contact centers cannot become employers of choice, whether the workplaces are bricks-and-mortar sites or employees' homes. Working in a contact center can be a rewarding, satisfying occupation. The solution lies, like in hiring candidate agents, in getting their acts together and in putting their best feet forward. **CIS**

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