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Dr. Donald E. Brown
President and Chief Executive Officer,
Interactive Intelligence, Inc.

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- Staffing for the Upturn
- Speech Technology Excellence Awards

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Nadji Tehrani, *Chairman and Founder, Technology Marketing Corp.*

Do You Have a Sales Prevention Department in Your Company? Part II

Since I first covered the issue of “sales prevention” in the February 1994 issue of *Telemarketing* magazine (the parent publication of this magazine), I have received several inquiries on this important topic. The following is continued from the October issue of *Customer Interaction Solutions*, where we addressed the first five areas that are most likely to contribute to sales prevention. Here are the remaining areas:

6. Have a Nasty CEO – Many entrepreneurial companies are started by ego-driven individuals. Wisdom and professionalism are substantially ignored when that CEO is dealing with customers. These types of individuals must never be faced with customers; it takes only one nasty remark to destroy a million-dollar deal. Believe it or not, we have observed this situation several times in the past.

7. Avoid a Loose Cannon on the Sales Staff – This is, perhaps, the most damaging situation for any company. A loose cannon can create not only a tremendous amount of unnecessary problems, but he or she can destroy a relationship and prevent any and all anticipated sales.

8. Avoid a Loose Cannon Anywhere in the Company – Obviously, such a person must not be tolerated by any responsible company. That individual can not only destroy the morale of the employees and create problems, but also, when contacted by customers, can create yet another major problem by destroying your relationship with the customer.

9. Do You Have a Chronic Complainer on Your Staff with a Bad Attitude? Believe it or not, some people are “never happy unless they are unhappy.” Such people will complain chronically. Not only do these people destroy morale within the company, they have the potential to significantly damage the morale and attitude of the sales department. This problem should also not be allowed under any circumstances, at any company.

10. Unwise Sales Compensation Program – One of the most powerful management tools is to develop a mutually beneficial compensation program that fosters accountability on the part of the sales people.

11. Lack of Teamwork – As a sports enthusiast and former coach for Little League soccer, I have learned that nothing is more important in any organization or any sports team than teamwork. One of the greatest things that I have heard along these lines is, “teams win, individuals lose.” To promote teamwork, companies must provide a team goal and make sure that every individual meets his or her needed sales results; otherwise this team goal may not be met.

12. Sales Support and Customer Care Should be Second to None – In today’s highly demanding consumer environment, sales support and customer care are just as important as selling a great product or service. We all know people who have canceled a contract with a well-known manufacturer, not because of product performance, but because of lousy customer care and customer

service. A situation like this qualifies as a sales prevention department because the unhappy customer is not likely to buy anything from your company if you have that kind of problem.

13. Rudeness and Unprofessional Behavior Must Be Eliminated at Any Cost – It is management’s paramount responsibility to train and communicate clearly with the entire company that rudeness and unprofessional behavior, either within the company or with customers, is totally and categorically frowned upon and not tolerated by management.

Focusing On the Strategic Needs of Your Customers

In addition to avoiding the above problems, a progressive company with savvy management must focus completely on customer needs and customer care. Today’s customers, in my opinion, are looking for the following:

1. Better, Cheaper, Faster – This is clearly the formula for success for any progressive company. Customers demand better, cheaper, faster products. To survive, suppliers must comply at all costs.

2. Customers Need a Competitive Advantage – Obviously, with the highly competitive environment today, if you don’t have the competitive advantage, you cannot sell your products. Customers expect their vendors to give them a competitive advantage and, most importantly, they expect their vendors to differentiate their products from their competition.

3. The Customer Demands All of the Above, Yesterday – That is, they want it and they want it now. To prosper, you need to reinvent your company to comply with all of the requirements indicated above in order to run a successful company and avoid lost sales.

These rules were created as the result of years of experience in business. For us, these are the cardinal rules of successful business, and they should be the cardinal rules of any company. Indeed, over the years, I have personally lost a lot of money because of ignorance of the above golden rules of business, and my objective is to share them with you so you don’t make the same mistakes that I have.

The bottom line is that if you want to eliminate the sales prevention department, which exists in perhaps 95 percent of companies, you need to address all these problems and eliminate anything that is contributing to sales prevention in your company. **CIS**

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

IN EVERY ISSUE

- | | |
|---|---|
| 1 Publisher's Outlook
By Nadji Tehrani, Chairman and
Founder, Technology Marketing Corp. | 20 Ask the Experts
By Tim Passios, Interactive Intelligence |
| 4 High Priority
By Rich Tehrani, CEO,
Technology Marketing Corp. | 28 On The Line
By Tim Searcy |
| 6 Headset
By Keith Dawson | 31 The Integrated Marketplace |
| 12 Customer Interaction News | 31 Advertising Index |
| | 32 Logout
By Brendan Read,
Senior Contributing Editor |

What's on the Cover



**Interactive Intelligence Unifies
the Enterprise**

pg **14**

CALL CENTER TECHNOLOGY

- 8 Changing Times, Changing Data Management**

WORKFORCE OPTIMIZATION

- 16 Staffing for the Upturn**

CRM, BPO & TELESERVICES

- 19 On the Go CRM**

SPECIAL FOCUS

- 24 Unifying the Headset**

AWARDS AND RECOGNITION

- 30 Speech Technology Excellence Awards**

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

Group Publisher
Richard Tehrani (rtehrani@tmcnet.com)

EDITORIAL

Group Editorial Director, Erik Linask (elinask@tmcnet.com)
Senior Contributing Editor, Brendan B. Read
(bread@tmcnet.com)

Senior Editor, Erin E. Harrison (eharrison@tmcnet.com)

CONTRIBUTING EDITORS

David Sims, Susan Campbell, Stefania Viscusi, Keith Dawson

TMC™ LABS

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

ART

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

EXECUTIVE OFFICERS:

Nadji Tehrani, Chairman and Founder
Richard Tehrani, Chief Executive Officer
Dave Rodriguez, President
Michael Genaro, Executive Vice President of Operations
Tom Keating, VP, CTO and Executive Technology
Editor/SEO Director

— To Subscribe, Call: 203-852-6800 —

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Circulation Director, Shirley Russo (srusso@tmcnet.com)

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x105, tmcnet@theYGSgroup.com.

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glennf@i-s-t.com or call 914-765-0700 x 104.

ADVERTISING SALES: 203-852-6800

Karl Sundstrom, ext. 119 (ksundstrom@tmcnet.com)
Executive Director of Business Development
Eastern, Western, International

EXHIBIT SALES: 203-852-6800

Global Events Account Directors

Companies whose names begin with:

A-L or #s: **Maureen Gambino** (mgambino@tmcnet.com)

M-Z: **Joe Fabiano**, ext. 132 (jfabiano@tmcnet.com)

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

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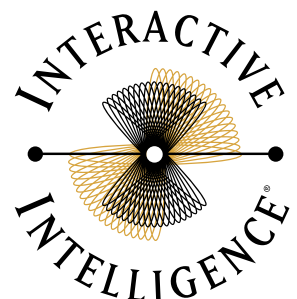
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Rich Tehrani, CEO, Technology Marketing Corp.



Go Upstream, Identify Problems Before They Hit Facebook and Twitter

Social media is all the rage these days and unless you spend a good portion of your day tweeting or posting status messages on [Facebook](#), you may think you aren't doing your all to engage your current and potential customers. I have seen firsthand how marketing departments are frantically trying to understand what their customers are saying so they can improve sales in an economic slowdown that has caused sales to suffer and jobs to be lost.

Enter the contact center, that repository of information that can do almost everything social media can and more. Let's be clear that while I am not encouraging the abandonment of social media I am convinced there is so much more work we can do to understand customers if we just spend some time to better analyze contact center data.

In a recent conversation with call recording leader [OAISYS](#), I had a chance to learn more about the company's Tracer Version 6.0, which is loaded with new features designed to allow companies to better integrate customer feedback into their business processes. CEBP, or communications enabled business processes, is a hot area as these solutions allow companies to integrate communications to improve workflow, productivity and most importantly the bottom line. I consider the 6.0 version of Tracer to be an important product to watch in this area.

I had a long conversation with Brian Spencer, OAISYS president, in which he explained that this version of the product is based on customer feedback going back to the product launch in 2002.

He was enthused as ever while explaining how the latest incarnation of his company's solution can choose to record calls or even have calls be sent for live monitoring based on business rules which include the duration of the call, which team was responding to the call, how the call was routed, CRM data, etc.

Perhaps one of the most beneficial features of Tracer 6.0 is the owner's function, which is an auto-generated report that lets a manager see exactly how and if these new features are being used. As companies take on more and more priorities with less people, it is not uncommon for a solution to be purchased and not implemented for some time. The good news is the report can be sent automatically via e-mail so the C-suite can keep tabs while on the golf course or aboard

corporate one. Spencer says this feature gives transparency and transparency is great for people who get the job done. Who can argue with that?

Another important addition is an API which allows call recordings to be integrated seamlessly into a variety of applications meaning you can now listen to calls which are attached to an Outlook contact or a [Microsoft](#) Dynamics CRM record.

For me, this was the "A-ha" moment when I started to realize how social media is just now beginning to recreate information which is already housed on corporate contact center servers. It was at this point Spencer said, "Tracer 6.0 with the API bubbles up the necessary information at the point where it is most valuable."

Obviously the next question was when speech-to-text integration will enter the mix. The answer? Sometime next year. Spencer thinks this functionality will be important for healthcare, financial services, applications such as e-discovery and, of course, "Enterprising contact centers looking to improve customer service levels as high as possible through the advanced use of technology."

Our conversation ended with Spencer saying he believes companies need technology to monitor each communications channel such as Facebook, Twitter, contact center conversations and email – or they may miss vital information from their customers. He feels (and I agree) that often people "blast off" when they have a positive or negative experience with a company. His closing thoughts were that companies can go upstream and control what is being said on Facebook and Twitter. It seems much more cost-effective to seek out and correct systemic and potentially embarrassing problems before they find their way onto the Internet... who can disagree with that? **CIS**



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Keith Dawson, Senior Analyst, Frost & Sullivan



Paying Attention to Customer Data Security

Today's contact centers act as a funnel for massive amounts of data that flow from silo to silo. Some forms of data are kept long term and archived; others are needed only fleetingly and are soon discarded. The sheer quantity of it, though, is staggering, on the order of petabytes of information. And that creates a bit of a problem when it comes to managing and isolating the specific pieces of data that need to be secured and safeguarded because of customer privacy concerns.

Customers are much more sensitive to what happens with their personal information than they used to be. Breaches that can be traced to contact centers are rare, but companies need to battle the perception of insecurity as much as the reality. And attention to better data handling and security can be fashioned as a key competitive differentiator for a company that takes pains to let customers know that it is active in that area.

Data security is a well-managed area in corporations, with regimes and protocols that guide the handling of different categories of information, including customer data. Health care and financial services firms have long had mandates that spell out proper procedures for releasing personal information about customers. From the contact center point of view, emphasis has usually been on making important data unavailable for agents to misuse or take away from the center.

At the most rudimentary level, this has involved removing the means for agents to copy or download personally identifying information about customers – restricting disk drives and printers, for example. However, there are always ways to circumvent those restrictions (for example, you can take a picture of a computer screen with an [iPhone](#)).

The best standard for data protection came out of the credit card processing industry. PCI, or Payment Card Industry Data Security Standard, was created to insure safe handling of customer account data. It goes well beyond the contact center to control how companies manage their network architectures and build consistent (and ongoing) security policies for data handling.

In the contact center industry, few companies actually use [PCI](#) (or any rigorous and defined customer data security standard). The financial services industry is the largest and by some measures most important sector of contact center business. Because they rely intensely on PCI, vendors of contact center systems have been integrating PCI compliance into their call handling infrastructure. We've seen a move towards incorporating PCI into call recording, for example, preventing recorded calls from saving the customer PIN numbers or Social Security numbers, depending on the application. Vendors are keen on implementing these features because they provide a route into that lucrative financial services market.

It also means that companies outside that sector can take advantage of a rigorous security protocol built for the demanding credit card business.

Another approach is built into an interesting application from a service provider called Interactions.net. Their model is to simulate an IVR by presenting callers with a natural language automated interface. They chop each call into tiny six-second chunks, and pass each chunk to a human to figure out what the caller's intent is during that increment. It's a specialized application, but one of the by-products of the model is that no human ever hears more than a tiny piece of the caller's entire data set. In a given call, the customer may speak his name, his phone number, his account number, and his social security number – but they are all farmed out to different "agents" during the call, so no two pieces of data can be put together in a form that's personally identifiable. That's the definition of security.

It may be an extreme way of handling the data, and certainly isn't what Interactions.net set out to build, but it may provide a model for how we handle identifiable information in the future. Some speculate that we may start seeing security applications that chop up the data saved by contact centers – the screens scraped, calls recorded, and so forth – into discrete segments that then camouflage certain pieces from unauthorized users. So an evaluator checking an agent's performance wouldn't need to see the part of her captured screen that included certain sensitive data, for example, unless it was part of the specific task that the evaluator needed to check.

In the long run, we're likely to see more security solutions emerge from the financial services sector, as that industry controls more (and more varied) pieces of information about customers. Most contact centers will probably adopt customer security tools on an ad hoc basis, unless the pressure from their customer bases rises.

In the meantime, some gentle suggestions to those that are ambivalent about adopting some security protocols: document what you are doing; audit what you have available as far as technological resources; and see what measures are in place via the existing IT infrastructure that may be extended to the contact center. You may find that you can add a bit more security than you have with minimal extra cost. And once you do that, trumpet what you are doing to the customer base. That value-added service may be worth a few customer satisfaction points. **GIS**



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Changing Times, Changing Data Management

The artery of contact centers is real-time data: customer identifiers, interactions, transactions, and responses that live agents and increasingly automated voice, e-mail and Web applications capture and transmit. With the need to learn more about customers, and to meet their needs more effectively comes the need to handle more data. How that data is managed: including accuracy, handling and processing is key to organizations' success. That includes ensuring data security and privacy backed by a growing array of laws.

We approached leading enterprises representing a wide range of data solutions with questions about real-data management including on:

- Any potential data handling and bandwidth issues, including for at-home agents
- Energy consumption and environmental footprint
- Data security and privacy
- Data accuracy

Here is a selection of their responses:

LiveOps (www.liveops.com)
Paul Lang, Senior Vice President, Product Management

We feel that real-time data handling within contact centers is for the most part well-in hand. For home agents bandwidth needs to be factored in; there needs to be broadband connection and a dedicated telephone line to ensure quality service.

Privacy and data security are becoming paramount and applications should be explicitly configured to exclude logging of sensitive information such as social security numbers or non-public personal

information data. There is the ongoing need to regularly audit systems and data for compliance.

There are a number of standards that have been set as security benchmarks. These include PCI-DSS (Payment Card Industry Data Security Standard), Health Insurance Portability and Accountability Act and ISO 27001 and 27002.

Oracle (www.oracle.com)
Rich Caballero, Vice President, Service Products

The applications must be tuned and optimized to receive large amounts of data in real time. If not, the user experience degrades significantly as user-interface response times increase and the data is not refreshed in a timely manner. Properly engineered solutions will also reduce the network bandwidth and processing power required. Service organizations should make sure that their on demand or on-premises applications can scale to meet their needs.

Oracle uses advanced database technology, server virtualization, and query optimization to minimize network bandwidth and CPU utilization. This in turn



reduces the power and cooling requirements. In addition, the Oracle data center facility itself has been designed from the ground up to optimize consumption and footprint.

Many of our customers are taking three steps to reduce fraud and enforce data security. The first is around authentication. A customer must positively and uniquely identify himself in order to interact with a contact center agent. To make this process as simple as possible, self service IVR or voice biometrics are being adopted.

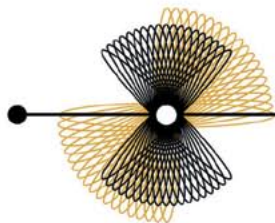
Second, all sensitive data must be destroyed or encrypted. Any organization processing credit cards must be PCI-compliant which requires the agent to be able to erase any credit card information from a recorded conversation. If there is credit card information in a chat or e-mail transcript, then that information must be encrypted and transferred using secure FTP.

Finally, proactive alerts to detect fraud are being deployed. Predictive analytics can be leveraged to alert contact center agents in real time to identify potentially fraudulent activity and prevent it from happening.

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With more personal information available online, privacy is certainly a growing concern. The best practice is to give customers control and monitor any agent access activity, making it very easy for them to change contact preferences online. This allows customers to control how a business can use their personal contact information.

The application should prevent service agents from having visibility to any personal information without first getting explicit permission from the customer. This permission should be recorded either via a voice recording or chat/e-mail transcript.

Finally, any agent activity must be recorded and stored. Every action that an agent takes within the application should be

auditable. Any chat or remote control sessions should be recorded and attached to the customer record.

Data quality is one of the biggest challenges organizations face. The value of your CRM application is directly proportional to the accuracy of the information in it. The explosion of contact information has simply increased this challenge.

Step one is to create a customer master that is the single source of truth with respect to contact details and preferred communications channel. Step two is to ensure that if contact details are to be edited or new contact records created, the master must be first be consulted and any resulting conflicts raised and resolved in real time. Finally, it is important that customers can update personal

How Beryl Handles Real Time Data

To get an idea of some data-handling and privacy issues faced by contact centers, The Beryl Companies, a teleservices firm specializing in serving healthcare organizations with inbound and outbound contact management offers an excellent example. Its 194-agent "call advisor" contact center at its Bedford, Texas head office handles sensitive data in real-time and near-real time. Information that is subject to stringent privacy laws like HIPAA.

Beryl has traditionally taken primarily inbound calls from healthcare consumers seeking information about physicians and classes available at their local hospitals. It has been asked by clients to provide increased and data-intensive services. For example it has been making more outbound calls for appointment scheduling and reminders, Web site-originated call-me-back-requests, and post discharging calling services, reports CIO Jim Stalder. That has led to a growth in real-time/near-real time data. In response Beryl is now offering new products that make the exchange of data between it and its clients more real-time in nature as compared with periodic updates such as physicians' contact information.

"For example, with our post discharge calling services, we need information from our clients on a daily basis about which patients were discharged from the hospital," says Stalder. "When we make those calls, we may also need real-time access to a particular patient's discharge instructions."

The real/near-real-time data environment at Beryl has made error and exception handling increasingly important. In the past, when data was infrequently updated, such as physicians' contact info, it was acceptable to realize a day or two after the data has been received that there may have been problems with the formatting or contents of the received

file. However, when the contact center products are near real-time, it is important to know in real-time if and when there is an error in that data.

"Otherwise, you might end up calling a patient to remind them of their appointment after their appointment was supposed to have taken place," says Stalder. "Or, you might have your contact center agents waiting around to start making calls, thereby losing time and productivity if there were problems with the data load and you didn't realize it until after the shift started."

Beryl has been carefully and imaginatively managing privacy issues. The written contracts between Beryl and its clients establish Beryl as a business associate and provide protection and limitations on using protected (personal) health information (PHI). All Beryl employees also receive HIPAA training as a standard part of their training and sign confidentiality statements upon completion.

To ensure privacy as well as to limit the amount of data handled Beryl has been working with its clients to minimize the amount of PHI that resides in its systems. In one particular case, Beryl's agents use a secured network connection to access one of its client's electronic medical records systems. They have unique user IDs and passwords into the client's system; the clients control what aspects of the medical record a Beryl advisor can access.

"A side benefit of this approach is that our clients can then audit and log all access by Beryl to their medical records," reports Stalder. "This is a significantly more secure and private approach to managing the data compared with Beryl getting a copy of the data and needing to take all the precautions around securing the data and auditing usage."



profiles online and those updates are immediately reflected in the customer master.

Teradata (www.teradata.com)

Dr. David Schrader, Director of Strategy and Marketing

As technology improves, an increasing percentage of customer interactions can be handled by the Web or IVR systems, with contact center agents handling dialogues that cannot be automated. Volumes on all these systems are going up, driven primarily by customer convenience.

The data input and output volumes and rates from contact centers can be sizeable. Uploading data from the contact center to the data warehouse may require parallel loads to keep up with volumes and short latency time goals. Most contact centers use portlets that use service oriented architecture callouts to obtain next best offer recommendations from the data warehouses to paint the agents' screens. So far, Teradata customers have experienced no problem with the capacity, either in data record sizes or latencies for inputs or callouts, which usually require sub-second response times.

We take energy consumption concerns seriously. For example, our latest 5550 series Active Enterprise Data Warehouse Server uses approximately 75 percent less energy and coexists with multiple generations of Teradata servers, thereby protecting customers' technology investments. The 75 percent reduction in electricity usage for the same capability data warehouse, as compared to Teradata servers of three to five years ago, is enough kilowatt-hours saved by one typical system to power 40 U.S. homes for one year. In addition, the 5550 Server reduces the floor space requirement by approximately 66 percent. By dramatically reducing energy usage for the same system performance, Teradata has also reduced associated data center cooling and power delivery infrastructure costs by a similar ratio.

Good data security depends on more than just contact center data handling, but requires a much more holistic approach. Using an integrated, enterprise data warehouse, accompanied with data governance best practices, is a viable and lower-cost approach to provable compliance and auditability than handling data security using a touchpoint by touchpoint piecemeal approach.

At the heart of any privacy program is respect for the customer, transparency in information collection and use, and – at the bottom line – returning value to the customer in return for information. Teradata's customers have learned over the years that when information is used to help or even "delight" customers by correctly anticipating their needs, the privacy issues diminish. It's all about fair use. Again, it's wise to tighten database security practices, taking strong measures such as those we mentioned above. These will help ensure data privacy.

TARGUSinfo (www.targusinfo.com)

Paul McConville, Executive Director

More contact centers are working with external partners to analyze, understand, host and make data actionable. This allows contact centers to focus on their core competencies. It is critical, though that this data can be accessed and leveraged in real time. At TARGUSinfo, our infrastructure was built from the ground up to handle tremendous loads of data. Per year, we handle more than 50 billion interactions across our network – something that sets us apart.

We have not seen technology limitations with our contact center partners that deploy at home agents. It is critical, though, that at home agents work on a system that is tied to a central system that can incorporate and deliver customer data and scores.

Regarding data security I have three suggestions:

1. Only take data that is absolutely necessary.
2. Limit access to customer data only to those that MUST access it to perform a clients' request.
3. Do not allow client data to be stored or copied to any device that can travel outside a secured facility.

Data privacy is definitely an issue for many industries, such as financial services and health care. Consumers trust that their personal information will be used only to the extent that they allow, such as to typically only to fulfill transactions.

If this trust is breached, there can be significant consumer backlash. Businesses must be sure to have a detailed privacy policy and should disclose any data uses to customers. It should be easy for customers to control data uses, choose communication preferences and opt-out if they wish their data to be destroyed/removed.

The rise of wireless and VoIP calls have impacted list accuracy as they account for over 50 percent of inbound calls to most contact centers. It is now tougher to instantly identify the names, addresses and previous purchases at the moment of interaction because phone numbers, previously a reliable identifier, are far more fluid. It is easier for people to change phone numbers, have multiple phone numbers and have phone numbers that are not tied to a precise geography.

It is critical for phone-centric companies to work with phone-centric data providers that are updating their customer records (i.e. linkages of name, address and phone number daily.) They should be sure to ask their data partners about their coverage of cellular and VoIP data. They should also be sure to understand how their data partner is supplementing phone data with other sources to ensure broad household coverage across the U.S., which is critical for real-time scoring. **CIS**



- **ASC** (www.asctelecom.com) offers lower bandwidth demand and increased channel hour capacity for IP call recordings with the EVOip Server Software 9.0, its new VoIP recording solution. EVOip 9.0 now offers post-compression of recorded calls and recording of screen activities. It also records screen activities independent of the company's quality monitoring solution, INSPIRATIONpro. The screen capability is triggered by audio recording, and search-and-replay is executed in conjunction with POWERplay.
- **Avaya** (www.avaya.com) has launched IP Office Release 5, which gives small and medium-sized enterprises enhanced tools that give them greater operational flexibility. It is packaged in six role-based solutions: tailored to roles such as "tele-worker," "mobile worker" and "customer service agent." The solution has been streamlined to a single, higher-capacity hardware platform, supporting more users and enabling more conference calls. Application deployment is easier by being accessible via Web browsers using thin clients. Business continuity is improved; if a location goes down, the system automatically re-registers to another IP Office hub. This lessens rerouting contacts when disasters threaten; it eliminates having a second system at a site solely for continuity purposes.
- **Avidian Technologies** (www.avidian.com) has come out with the Prophet OnDemand Premium Edition, which is the hosted edition of its Prophet Microsoft Outlook-based CRM software. It has all the features of the Prophet premises-installed product including including workflow automation, sales assistant, group e-mail wizard, sales opportunity tracking, and reporting. There are free upgrades to new versions of Prophet as released. It is easily upgradable to Prophet OnDemand Enterprise.
- **HardMetrics** (www.hardmetrics.com) has enhanced its HardMetrics Performance Manager data analytics solution. The new HPM Version 5.3 captures, stores, correlates and retrieves millions of rows of input data from disparate platforms and sources. It can analyze transaction-level, granular data from any operational source or platform. It provides transaction-level data correlation for end user consumption, such as call detail records, quality data and/or recordings, CSAT surveys, trouble tickets and work orders. HardMetrics has also upgraded data correlation and data aggregation algorithms resulting in increased database load/retrieval performance and increased dimensional and hierarchical analysis capabilities.
- **Oracle** (www.oracle.com) has integrated Oracle CRM On Demand with InQuira's On Demand Web self-service applications. The new solution enables customers to go seamlessly from self-service to live agent-assisted service. Contact center agents receive overall view of customer issues and actions taken, providing a consistent experience across Web, phone and social community-based channels. Easy authoring capabilities support content creation and maintenance best practices, giving organizations the ability to continuously improve knowledge all within their existing Siebel CRM or CRM On Demand desktop environments.
- **S3** (www.s3integrity.com) has unveiled the WuLi Solution, a proprietary customer self-service business process that combines customer-driven real-time analytics with a media-rich, online interactive experience. It enables companies to identify and address specific product/service-related problems and opportunities; to uncover and remedy underlying issues that generate customer inquiries; and to evaluate and apply customer feedback and interactions. **CIS**



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By Brendan Read

Idiro Introduces New (and Timely) Customer Attraction/Retention Tools

Customer attraction and retention at less cost is the single largest challenge firms are facing today. There are fewer customers, and many of them have less to spend. Customers know this and can afford to be picky and prickly.

Challenging markets require deploying innovative methods and the enabling tools to succeed in them. One of these is social network analysis, or SNA. This is the understanding of informal social networks.

These can be a circle of friends, work colleagues, neighbors or just a bunch of people who regularly hang out at a bar, restaurant, or increasingly online, with some commonality between each member. Information comes into networks where it is spread and discussed amongst the members. At some point in the discussions the leaders analyze and pronounce their take on the information and where called for a recommended action that the groups follow.

Viral marketing is becoming the primary tool to reach into social networks as it aims to connect to the leaders who would then spread the information to the entire group and suggest purchasing the products/services offered by marketers. Because people are social creatures and are in networks, viral marketing is arguably more effective than traditional mass and targeted marketing. To optimize viral marketing results though requires identifying networks, their members, and their leadership to target campaigns. That demands extensive research into what networks people belong to.

Mobile/wireless firms are facing increasingly stiff competition from not only each other but from new entrants via VoIP to keep and attract increasingly demanding and savvy customers. These firms can benefit greatly by SNA and viral marketing and are well-placed by their technology to use them and can do so by tracking customers' calling/contacting patterns have a fair idea of their networks and who may be the leaders. Yet to utilize SNA and successfully launch viral marketing campaigns require both expertise and scarce resources.

That's where Idiri Technologies (www.idiro.com) comes in. It provides SNA solutions for mobile operators, and has recently made it easier to do so with its recently introduced Idiri SNA Plus service.

This new comprehensive service is targeted to mobile/wireless network operators in North America and Europe. It is designed to help them address tangible business challenges such as customer acquisition and retention, new service up/cross-selling and reduced operating costs.

Idiro SNA Plus goes far beyond providing just SNA technology. The solution gives mobile operators access to several critical services, including ongoing consultation and evaluation of existing viral marketing and churn reduction campaigns, and technical training and support. It also includes admittance to Idiri's popular "Viral Marketing Workshops," which give operators practical instruction in the most effective strategies and techniques regarding the proper usage of data-driven viral marketing. Idiri's data-driven viral marketing approach first identifies appropriate subscribers to be targeted in order to initiate and maximize viral diffusion. It then offers a hands-on approach to creating and implementing specialized word-of-mouth campaigns, and quantifies the results. Operators are not simply offered a "how-to" manual and then left hanging but are guided each step of the way.

Idiro SNA Plus includes several other product modules that help mobile operators/providers reduce subscriber churn, generate revenue through data-driven viral marketing, and lower operating costs. Among these are:

- The Idiri Social Model, which is the analytics engine that powers Idiri's SNA solutions
- Idiri Retentions: predicts churners and influencers who can impact churn
- Idiri Acquisition: brings the science of SNA to member-get-member campaigns
- Idiri Families: identifies families, households and their leaders
- Idiri Fingerprinting: identifies rotational churners (spinners)

"In their ongoing search for an improved bottom line, operators have traditionally relied on inefficient and costly customer marketing initiatives," says Idiri CEO Aidan Connolly. "Data-driven viral marketing can drastically increase take-up rates – up to 400 percent – over traditional marketing campaigns. This works for acquisition, cross- and up-sell, and retention campaigns. Data-driven viral marketing is a really valuable element of Idiri SNA Plus. It is a big driver of both revenue and cost savings for our customers." **CIS**



Interactive Intelligence Unifies the Enterprise

A fascinating industry icon, Dr. Donald E. (Don) Brown has now founded and run three successful software companies. His current and largest one, 15-year-old Interactive Intelligence, now readies the introduction of a leap-frog offering that will cause you to rethink how communications technology is used throughout your enterprise.



Dr. Donald E. (Don) Brown, founder and CEO of Interactive Intelligence

Interactive Intelligence has unified the contact center and enterprise by creating and refining what it says is the only single-platform, all-in-one, multichannel IP-based communications software solution: Customer Interaction Center.

Now Dr. Brown and his team at Interactive Intelligence seek to further unify the entire enterprise by automating business processes using proven contact center technologies and concepts. There is a strong need for this with multi-step, people-centric processes that are still typically manual and paper-based, thus nearly impossible to effectively track. This leads to wasted time and resources, delays, missed opportunities and errors.

The solution Interactive Intelligence has come up with is called "Interaction Process Automation," which gives organizations everything they need to capture, prioritize, route, escalate and track each step of a business process. IPA leverages key components of the company's unified IP communications platform – including queuing and routing, presence, real-time monitoring, and VoIP – and uses them to automate critical business processes.

IPA can be applied to any vertical or horizontal, multi-step business process. It provides routing for business processes and data access such as by databases, mainframes and CRM

A Q&A With Dr. Don Brown

In *Customer Interaction Solutions'* meeting with Dr. Don Brown, founder and CEO of Interactive Intelligence, he shared several insights and advice:

CIS: What's your favorite non-work passion?

DB: My favorite leisure activity is rock climbing with my 23-year-old daughter. It's something fun and challenging that we can do together and a time she's not ashamed to be seen with me! I also enjoy flying my single-engine turboprop for both business and pleasure.

CIS: What's your biggest goal in life?

DB: I'd like to figure out a way to combine my interest in life sciences with my experience in computing to make a significant contribution – perhaps in areas like protein folding or genomic modeling.

CIS: What makes a great business?

DB: A great business is one that accomplishes a mission in a way that makes people want to come to work every day.

CIS: What are your priorities for Interactive Intelligence?

DB: My main priority is to re-establish rapid growth after making it through these treacherous economic times in good shape. To do that, we have to continue to build great products that make our customers more productive. In particular, I'm excited about our move into process automation as a way to extend our value throughout the organization.

CIS: What one piece of advice would you give to someone starting a business?

DB: Don't do it unless you've found something you care deeply enough about to work harder than you ever have in your life.

CIS: What Web sites do you spend most of your time on?

DB: NYTimes.com, ESPN.com, Nature.com, LeMonde.fr and Amazon.com (I never go to a store other than for groceries).



systems. It can communicate with other third-party systems via Web services; for example, it can obtain a credit report from a service like Experian. It does all of this using the Interactive Intelligence communications platform to move and track work through every step of a business process.

So, instead of existing solutions that statically “pull” work with little or no ability to associate communications interactions with a process, IPA dynamically “pushes” work through a process with each step tracked and recorded along the way for a true end-to-end solution. IPA squeezes inefficiencies out of business processes and reduces human error and latency, while optimizing resource balancing for improved customer satisfaction, increased productivity and decreased costs.

Here’s an example of how IPA works. A customer calls into a company to buy an insurance policy. IPA routes the call to the right agent based on rules such as the value of the customer, location and type of use (e.g. home or business). The agent then processes the application, creating an electronic document that may require the customer’s signature, which can be obtained by e-mail or via fax, and can be received digitally or scanned. The application next goes to the underwriter to be approved. IPA then looks via presence at which underwriters are available and routes the application to the most appropriate individual. IPA handles all interactions associated with the application and tracks the workflow to the end of the business process.

In short, what IPA offers for all departments is the same kind of highly efficient processing for things like customer orders and trouble tickets that have long been standard operating practice within contact centers. This is why IPA makes so much sense: it leverages the same technologies and processes that have already been proven in the contact center to maximize efficiencies, increase productivity and provide visibility into service levels. In effect, IPA extends this same sort of structured orchestration into the rest of the enterprise: finance, operations, marketing and sales.

“Our contention is that there are many processes that underlie and cross-connect all those operations that could be easily automated using the same concepts developed for contact centers,” Dr. Brown told [TMC](#) in an interview at ITEXPO West, held in Los Angeles earlier this fall. “We’ve figured out a structured way to deliver work for people in a way that is obvious for them, makes their job easier and enables others to determine how well they’re performing their job. We’ve taken all these proven communications technologies used for managing interactions – things like skills-based routing, call

recording, and presence – and applied them to work items so the entire enterprise can benefit.”

Of note is IPA’s ease-of-use and comprehensive feature-set, which includes a graphical authoring tool, service-oriented architecture, an orchestration engine, a presentation framework, a real-time monitoring interface and reports. IPA therefore marks a clear departure from existing business process workflow tools designed for programmers, and traditionally complex and costly business process management suites.

“In contact centers you know who is there and what value they are providing to the whole organization – that instant visibility into what’s going on,” says Dr. Brown. “But if you look at the rest of the organization such discipline doesn’t generally exist. Our goal is to make the entire enterprise function as effectively as its contact centers with a solution that is both easy to use and cost-effective.” **CIS**

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Staffing for the Upturn

If there is an upside to the downturn, it is that it has given savvy contact centers breathing room in that they can be much more selective than in the past when hiring employees. It has also given them an opportune slack period that they can use to retool their staffing processes to ensure that they have enough skilled quality personnel to handle increased demand in the upturn.



With companies focusing more on customer retention rather than relentless acquisition agents must be expert in hard skills such as sales and support, soft ones, like empathy, and multiple languages where needed, in written as well as voice, to keep and grow customers. To effectively manage these employees contact centers need to bring aboard supervisors who can enable strong results in productivity and in agent loyalty and retention.

Modeling Agents and Supervisors

The key to hiring the right people is knowing beforehand what you expect from them. Jeff Furst, founder and CEO, FurstPerson, recommends creating staffing models or profiles. To do that contact centers need to understand their business objectives, define their centers' jobs through a job analysis process, and understand which performance metrics drive their objectives and how their competency profiles relate to these metrics. They must determine pre-employment assessments to evaluate agents against these competency profiles, validate that candidates' scores correlate with performance metrics (i.e. as scores increase, CSAT increases) and "rinse and repeat" to drive continuous improvement.

"For contact centers that have a sophisticated hiring approach – that they have modeled out what an above average performer 'looks like' – they can systematically evaluate candidates quickly and objectively against this model," says Furst.

Berta Banks, president, Banks and Dean, recommends adopting a "best practices" approach: looking into, adopting and adapting methods, tools, and processes that work for similar and successful organizations. To implement it you need to engage your people from senior leadership to line managers and align them to the new strategy and win their commitment to support turning this plan into results.

Best practices also means communicating a compelling reason why should people work for your firm. You need to motivate prospective employees to put in their applications.

"It will take some effort on your part to uncover what attracted your best people to your organization, why they stay and what features of the job itself are appealing to people who are good in the role," says Banks. "But once you have this understanding you can develop a compelling marketing message for the job."

One of these compelling reasons for people to seek work with and stay at contact centers is the right environment. And that means hiring and training excellent supervisors. These individuals can inspire strong loyalty and performance from employees. The reverse is also true, and unfortunately all too common. Poor supervision can drive productivity into the tank, turnover into the sky and scare away quality agents.

"Supervisors' abilities to develop, coach, motivate, and manage teams will drive organizations to higher levels of performance," points out Dina Vance, senior vice president and leader of Ulysses Learning's Call Center Practice. "Questionable supervision exists today because most supervisors have come from within the ranks with little to no development. If supervision is impacting turnover and tenure, then the development path for supervisors needs to be reconsidered not the hiring practices."

Contact centers can reach outside to proven supervisors and managers that have worked in other centers or in similar sectors like retail and hospitality. On the other hand hiring from within confers another important benefit by creating a career path for new agents, which helps with retention.

"The key is to have a validated research based hiring process for selecting supervisors," says Furst.

Staffing for New Communications

There has been slow but steady increase in the use of and growing customer preference for written communications: chat, e-mail, SMS/text and social media. Yet this trend is posing challenges for many contact centers as they are finding out that their voice agents may not write well and/or use these tools effectively.



Oscar Alban, principal global market consultant, Verint Witness Actionable Solutions, says contact centers must adjust their hiring requirements to draw candidates that are highly skilled in chat, e-mail and IM, as well as proficient in communicating via the written word. Yet too many of them have been focused on voice only despite the new channels.

Contact centers, he says need to attract “candidates that either have a background in leveraging such technologies, or the ability to learn quickly. [Also] it will be important to identify agents who can communicate via written channels from the existing labor pool, and train them on process and procedure.”

Should contact centers hire voice/written multichannel agents or instead recruit specialized staff? Depends on the organization.

“Some organizations still have such a small volume of chat/e-mail contacts that it does not make sense for them to hire specialized agents – yet,” says Furst. “Organizations, especially those with consumer-based technology products, have high chat/e-mail contact volume that it makes sense to hire specialized agents. As long as the hiring profile has been carefully created using job analysis methodology and the hiring process has been validated, either approach can be successful.”

Social media is emerging as a new recruiting tool, an extension of informal word of mouth. Yet it has not been proven to effectively deliver the numbers of new hires that many contact centers need.

New Recruiting Avenues

When contact centers are ready to hire they need to pick the best avenues. That means a careful analysis of the ones available. The new and rapidly newer routes of attractive Web sites with pre-screening tools, along with job boards and online advertising are beginning to displace traditional print ads and walk-ins. John Hoholik, executive vice president, sales and marketing Evolv on-Demand, sees this happening because these new channels are less expensive and they can assess applicants’ computer skills, which they can do to some extent online.

Social media is emerging as a new recruiting tool, an extension of informal word of mouth. Yet it has not been proven to effectively deliver the numbers of new hires that many contact centers need.

“Social media is interesting but our experience is that social media recruiting cannot drive the candidate volume for most contact center recruiters when compared to the effort to manage these campaigns,” says Furst.

Instead FurstPerson continues to see that best-in-class hiring contact centers will drive 30 to 50 percent of their hires from employee referral programs. That of course requires contact centers to be excellent places to work.

Teleservices firm InfoCision offers an excellent illustration of this. It uses a blend of newspapers and online job resources connected to them, newspapers, employment Web sites, job fairs, billboards, radio, social services organizations and referrals to recruit staff. This last one is enabled by InfoCision’s exceptional range of employee benefits, including fitness centers and wellness clinics that it continues to add. In spring 2009 it opened the InfoKids on-site child care at its Akron, Ohio headquarters.

Contact centers should look into specialized employment programs that connect specific and high-qualified labor pools with jobs. One of the newest and largest of these groups, on account of the Afghanistan and Iraq wars, are military veterans. Employers say there are few individuals more motivated, who can take pressure, and who are true team players than those who have served their countries. Contact centers can accommodate both able-bodied and the service-disabled in bricks-and-mortar and home office locations.

The U.S. Army has a recruitment program, Army Partnership for Youth Success, which enables post-service employment for its personnel, carried out in partnership with employers who agree to hire honorably discharged soldiers who had enrolled with PaYS when they joined. InfoCision is one such contact center employer who has enlisted with Army PaYS. It recently received an e-mail from a soldier currently serving in Iraq inquiring about what types of positions it offers; he is interested in being interviewing when he gets out in April.

“This partnership with the U.S. Army PaYS program offers us another way to attract dedicated and talented employees to our company and provide our soldiers with a solid opportunity for employment after serving our country,” explains InfoCision Senior Vice President of Corporate Affairs Steve Brubaker.

Quality Screening Methods

There are a growing range of methods and tools being adopted by contact centers to recruit and screen staff to meet agent and supervisor profiles. Ulysses Vance recommends using three types of interviews to obtain the full spectrum of the would-be hires. These are: pattern: covering the basics such as skills and learning about applicants’ backgrounds; situational: allowing candidates to “live a day in the life of”; and peer: permitting prospects to talk with peers to understand the expectations from their viewpoints.



Furst recommends data driven, research-backed pre-employment assessment models, automated voice testing to measure speech clarity, Web-based solutions that objectively screen candidates against predictive hiring model and simulations to test candidates' abilities. These tools, when necessary should be customized to specific needs. As an example his firm has come out with a new hiring process for tech support reps that is improving quality of hire for its clients by up to 30 percent.

"Our in-depth review showed that many support reps lacked the ability to learn and apply complex information effectively. Closing this gap as part of a comprehensive pre-hire screening process yields significant gains for on-the-job performance."

– Brent Holland

The new solution helps staffing managers identify candidates who have a better understanding of technical issues, can explain these well to customers via the phone or chat, and perform at a higher level. It screens for competencies that are critical to successful performance including compliance, composure, computer skills, dependability, listening, oral communication, probing, problem solving, stress tolerance and tact.

"Many companies assume that technical knowledge or interest in technology is the key competencies for successful technical support representative performance," says Brent Holland, vice president of research and consulting at FurstPerson. "[Yet] our in-depth review showed that many support reps lacked the ability to learn and apply complex information effectively. Closing this gap as part of a comprehensive pre-hire screening process yields significant gains for on-the-job performance."

Evolv on-Demand's Evolv Foresight Suite 2.0 offers reading comprehension/grammar and computer navigation and literacy assessments. It features a side-by-side applicant comparison that improves recruiter efficiency by allowing them to directly compare candidates with similar profiles and assessment scores. An Individual Trainer Tracking keeps trainers accountable by providing post-training performance and retention metrics for classes that they have. The solution's simulations have improved screening accuracy and provide more realistic applicants' interfaces.

Such tools can make a difference in more efficiently finding the right employees. PlumChoice provides outsourced tech services; all of its support reps are U.S.-based working from home. Over

the past 14 months it has deployed behavior-based interview and assessment tools from AchieveGlobal, Provelt from Kenexa, and Brainbench that improved its resume-to-hire ratio from 17:1 to 5:1.

Berta Banks recommends that organizations figure out the roles and functions of the positions to be filled and competency qualifications and measurements before laying out the money for recruiting and screening solutions to figure out what they need. Contact centers should also look at adding behavioral tools to your process for their high predictive capabilities; these objective assessments, such as her firm's "Optimism" solution, add stability to the measurement process.

"Meaningful change in recruitment, has often taken a backseat to the magic wand of technology solutions," she points out. "Yet the real solution and tools for successful recruiting are within your reach. Bringing structure and best practices to your recruiting process is no different from following the business rules and process created for every other area of your business: it is the basis for ensuring a reliable outcome."

Staffing for the Home

More contact centers are going home. And that means finding, and screening for the right agents and supervisors who can work in that environment: namely the ability work to independently, and who can solve problems, like fixing minor computer/or phone glitches.

There are solutions to assist with assessing home agents. Evolv on-Demand has updated its computer diagnostics tool that allows hiring organizations with at-home talent to assess applicants' computer specifications and broadband connectivity speed.

Banks and Dean found that many of the skills and experience qualifications that make a good brick and mortar agent are transferable to the home agent role. Its behavioral research into the attitudinal traits associated with optimism and performance and retention in various contact center agent roles found a remarkable similarity between home agents and traditional agents.

"So if we are transferring current successful agents, we only need to assess whether they can perform well in a home-work environment, with the different level of direct supervision and coaching that will be offered," says Banks. "Remember, your agents are not the only staff that will need to be able to perform in this environment – also examine your team managers for fit as well." **CIS**

The following companies participated in the preparation of this article:

AchieveGlobal
www.achievegloabl.com

Banks and Dean
www.banksanddean.com

Brainbench
www.brainbench.com

Evolv on-Demand
www.evolvondemand.com

FurstPerson
www.furstperson.com

Kenexa
www.kenexa.com

Ulysses Learning
www.ulysseslearning.com

Verint
www.verint.com



On the Go CRM

The days of being tied down and/or rushing back to desks to manage customer relationships are fast drawing to a close thanks to new and rapidly evolving mobile CRM tools, aided and abetted by powerful netbooks and smartphones operating on 3G and very soon 4G/LTE networks. Mobile CRM apps are delivering functionality that is quickly approaching that of CRM solutions used at fixed locations.



Here is a sample of the latest developments in mobile CRM from leading suppliers:

Maximizer (www.maximizer.com)

Maximizer Mobile CRM has been certified for Bell Mobility, Sprint Smartphone and AT&T networks. The AT&T certification validates that Maximizer Mobile CRM solutions for BlackBerry and Windows Mobile smartphones that are fully supported on the AT&T network and devices. Maximizer Software is also a RIM BlackBerry ISV Alliance Member and Microsoft Gold Certified Partner. Maximizer Mobile CRM, which is aimed at small-mid-sized businesses, gives users instant access to information in the field, including customers' history, leads, sales opportunities, dashboards, customer service cases, documents and schedules.

Netsuite (www.netsuite.com)

Netsuite has developed what it says is the first cloud computing mobile ERP (enterprise resource planning) suite to Apple's iPhone and iPod touch. The app delivers on-the-go access to NetSuite's integrated business management suite, including real-time dashboards that deliver key ERP, CRM and e-commerce operational data.

The dashboards are interactive, allowing users to drill down and explore trends with the touch of a finger. The calendar supports accepting or declining events and marking tasks complete. Lead, prospect, and customer records are tailored to mo-

bile sales, service, and executive leadership. They get access to associated contacts, marketing campaigns, opportunities, quotes, orders, purchase history, financial history, cases, and issues. There are productivity tools that leverage the wireless devices' native capabilities. These include click-to-call from any NetSuite record containing a phone number, click-to-e-mail from any record containing an e-mail address, and click-to-map (via Google Maps) from any record containing a physical address.

Salesforce.com (www.salesforce.com)

Salesforce.com now offers Mobile Lite, a new free mobile offering that provides customers with instant access anywhere to Salesforce CRM. Mobile Lite available for iPhone, BlackBerry smartphones, and Windows Mobile devices. Mobile Lite provides salesforce.com customers basic access to some of the most common Salesforce CRM features. It allows end users to log calls and e-mails, update activities and tasks, and view account and contact details, leads, opportunities, cases, solutions, assets and dashboards from their mobile devices. With just a few clicks, customers can upgrade to the full functionality of Salesforce CRM Mobile application.

Salesforce CRM Mobile has been updated with new features for iPhone and iPod touch. Customers now have access to new features including the ability to cut, paste and copy, clone records, create

custom filters, and manage tasks using a new calendar interface.

SAP (www.sap.com)

SAP offers the BlackBerry Sales Client for SAP CRM, which gives users simple, secure, real-time access to customer information in SAP CRM with the same seamless and intuitive experience they have come to expect from BlackBerry smartphones.

The integrated solution also has several key innovations. There is instant access to up-to-date information; in just one or two clicks, users can gain access to up-to-date client data including contacts, sales leads and logged activities. The new solution can automatically deliver or "push" all customer data updates in the SAP CRM system to users as well as push sales leads to the BlackBerry smartphone inbox: With one-click access to the new information. Contacts and account information are also continuously accessible on BlackBerries; a local cache system allows access to certain information even if the users are outside of network coverage.

The SAP CRM and BlackBerry integration also combines both suppliers' security systems, enabling end-to-end encryption to help protect confidential customer information whether stored on a BlackBerry smartphone, in transit or in the SAP CRM application. IT administrators can also securely deploy the BlackBerry Sales Client for SAP CRM to users over-the-air. **CIS**

Skills-Based Routing: The Tool You Need to Generate Revenue and Retain Customers



By Tim Passios,
Director of Product Management

If you are looking for ways to increase revenue and customer retention through your contact center, start with skills-based routing. There might be no better project that will have such a dramatic impact in your contact center. Skills-based routing:

- Decreases agent talk time. When customers talk to the best-skilled agent for their problem, they spend less time discussing irrelevant issues.
 - Decreases hold times. When agents are more available, wait times decrease.
 - Decreases costs. Less talk time means less per-minute charges from your carrier.
 - Increases first-call resolution rates. Always a big hitter in driving customer satisfaction.
 - Increases the number of interactions handled by your contact center. The faster problems are resolved the greater the number of interactions that can be handled.
 - Increases revenue opportunities. When customers are getting their problems resolved faster, they are more susceptible to cross-sell and up-sell opportunities.
 - Increases customer retention.
3. Segment your agents into skill groups based on their skills. Typically, you will have multiple skill groups because agents have different levels of skills. If the first level of agents is not available, the second level can take the interaction.

With these advantages, skills-based routing is one of the most valuable and impactful changes you can implement.

Implementation

Consider this your skills-based routing “to do” list.

1. Identify the skills that your customers need.
2. Identify the skill-sets of your agent pool that match your customer needs.
4. Define your queues. Depending on your contact center’s technology, here are a few suggestions:
 - Basic ACD Technology: Create separate queues for each skill group. While this isn’t very efficient and presents some logistical issues (manually moving agents in and out of queues as demand changes), it achieves the basic goal.

“Identify the skills that your customers need. Identify the skill-sets of your agent pool that match your customer needs. Segment your agents into skill groups based on their skills. Define your queues. Define how calls will get routed to those agents. Train your agents. Monitor, measure and adjust.”

—Tim Passios

- Advanced ACD Technology: Create one queue and use ACD routing logic to route to the right-skilled agents within the queue. This provides seamless routing to secondary agents when the primary agents aren't available.
- 5. Define how calls will get routed to those agents. Here are a few suggested ways:
 - DNIS – Offer special toll numbers for your customers with each number being associated with skill groups within your contact center.
 - Basic IVR or Auto-Attendant – Use one toll number for all customers and segment customers through menu choices (1 for English, 2 for Spanish, etc.). Again, not the most efficient, but it does work. While customers may not like the additional choices, they get good service which makes them happier.
 - Advanced IVR or Bulls-Eye Routing – Use one toll number for all customers, first identify the customer by their ANI, customer ID, account number, etc. Then perform database lookups that identify their account priority, skills needed, products owned, agent last talked to, or a whole host of other possible attributes by which you can route them to the best skilled agent.
- 6. Train your agents. The better trained your agents are, the better customer service they will provide. Use additional training to fill in the gaps where the largest group of customer skills is needed. If your contact center generates revenue, your agents need to be trained to identify and handle cross-sell and up-sell opportunities.
- 7. Monitor, measure and adjust. Reports are crucial and customer

feedback essential in making sure that your plan is working. Monitor changes closely and don't be afraid to make changes to get it right. Implementing call recording, agent scoring and post-call satisfaction tools will help you make the right changes.

Fine Tuning

A good question that usually gets asked is, "How do you avoid having your higher-skilled agents taking all of the calls and how do you fairly compensate them?" First, get your HR department involved early and provide them with suitable compensation strategies and training methodologies. Here are a few other things to consider:

1. Use of workforce management tools – When you implement WFM, you gain the ability to create schedules that help you staff the contact center based on historical interaction volume. This data helps you staff according to the skills that are being projected for upcoming shifts. This overcomes the issue where higher-skilled agents get all of the calls.
2. Motivation – Typically, the more skilled an agent is, the more that agent is compensated. That should be the right kind of motivation necessary for a higher-skilled agent to take more calls. If pay is not a motivator, there are certainly other ways to motivate agents to handle more call volume including earned vacation time, time off the phone, points used towards retail purchases (see www.snowfly.com), etc.
3. Staffing and Training – Hire highly-skilled agents to meet customer demand and train lesser-skilled agents to handle the higher-skilled calls. **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

tom.farquhar@zeacom.com


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by Brendan Read

Unifying the Headset

There is a unification beginning to happen in contact centers. This is a coming together of voice, written, and video channels, of care and sales to deliver quality customer-retaining service, focusing on retention, and office, mobile and home workplaces.



This unification is now affecting contact centers' single most critical appliance: the headset. There are new features, options, and application considerations that must be looked into so you can optimize the functionality of this vital tool in this new unifying environment.

The IP/UC Revolution

IP telephony, replacing old-fashioned TDM is enabling voice/data and video communications integration into a single pipe to the terminals: be they desktops, laptops, or smartphones. The benefits include an easier enabling of a single view of customers, greater flexibility and lower capital and operating costs.

IP can allow you to do away with bulky, expensive, separate real-estate-chewing handsets and replace them with less costly – by 60 percent or more – and much more flexible softphone applications connected to headsets. With softphone/headset combinations calls are quicker and much more accurate: one on-screen radial button to push instead of 10 buttons to press. There are fewer wires to install, and to worry about. Moreover softphones can be easily accessed anywhere: from other agents' desks, home offices, or mobile via Web-based applications.

Equally if not more importantly IP can also permit via wideband (a.k.a. HD) voice that enables greater voice range, hence, more natural sounding acoustics compared with that delivered over TDM. A Wikipedia article explains that the range of the human voice extends from 80 Hz to 14,000 Hz. While traditional TDM calls is limited to 300 to 3,400 Hz, IP-enabled wideband covers from 30 Hz to 7,000+ Hz.

The benefits of wideband/HD voice are tangible. For example it enables agents to distinguish between similar-sounding names and syllables much easier, thereby cutting down on the

instances where callers asked to repeat themselves. This reduces talk time and call costs and boosts customer satisfaction.

To enable wideband companies must ensure that their phone systems recognize it via codecs such as G.722 and G.722.2 AMR-WB, explains Mohamed Alaa Saayed, an industry analyst with Frost and Sullivan. Most major IP PBX vendors already incorporate G.722 into the list of allowed voice codecs in their systems. Firms must check and see that their LANs and WANs are capable of managing G.722 data transmission rates. Lastly they need to make sure that the IP phones or headsets purchased are compatible with and adequate for wideband voice.

“Just as with HDTV, the ultimate goal is a better end-user experience,” says Saayed. “As applications such as audio conferencing, speech recognition and CRM apps grow more enterprises are expected to consider deploying HD voice technologies.”

Sennheiser is launching a wideband-enabled series of products. The new single-earpiece SH 330 iP and its dual-ear-cupped partner SH 350 iP features wideband-capable microphones and speakers housed in a contact center-tested chassis that can withstand the abuse of a grueling shift.

“The quality is so good with wideband,” reports Eric Palonen, product manager, Sennheiser Consumer Electronics, “that you sound like you’re in the same room with a customer rather than on the phone with them.”

Voice, written and video channels delivered by IP are becoming integrated with presence tools, such as unified communications. UC solutions give agents and supervisors one-screen-click access to callers, and if need be, using presence information to transfer calls to the right available



individuals regardless of their location. UC also permits one-click outbound calls to names in databases and lists. Softphone/headset combinations via IP especially enable integrated connectivity into UC applications.

“The role of headsets in the UC space is going to be vital to not only enhance voice quality and standardize it across multiple UC applications and devices, but also to integrate the different types of voice deliveries,” explains Saayed.

Headsets that are to be used with UC applications need to be optimized via drivers for particular vendors’ software to take full advantage of specific features such as click to call or transfer on the screens that saves seconds compared with looking up and dialing the numbers. Otherwise when headsets designed for one UC solution are used for another supplier’s product contact centers must hook up adapters which add to costs. The need for such tools is diminishing, though as more sets become optimized for specific UC applications; their software recognizes the tools and adjusts the appliances automatically.

For example the **Jabra** PC Suite includes drivers for a range of softphones, including Cisco IP Communicator version 2.0.1.1 or above, SKYPE Version 3.2. or above, and **IBM** Lotus Sametime, version 8.0.1 or above (not version 8.0.2). The solution enables remote call control with Jabra wireless headsets and IP softphones; users can answer and end calls up to 300 feet away from their desks.

The chief downside is that UC sets are still viewed as quite expensive in comparison to traditional units. This can be as high as a factor of five.

“Yet as more firms buy UC solutions they will dig a little deeper to acquire the sets so that they can obtain maximum benefit from their investments,” says Saayed.

Improving Quality

To provide customer-retaining service at lower costs more contact centers are seeking higher quality, more durable and wearer-comfortable sets say suppliers. Buyers are now realizing they have been spending more on hardware and support by purchasing cheaper but less robust and marginally-performing products compared if they had bought more rugged better-sounding if more expensive units. They are also getting it that user comfort enhances productivity.

Suppliers say that sending broken headsets to be repaired adds costs by requiring buying adequate numbers of spare units or risk losing agent output; they need the sets to work. And if sound quality is just average, users may find themselves repeating information like credit card number,

which extends calls, annoys customers, spelling names and numbers out adds significant time.

“Companies are seeking and seeing an ROI in quality,” says Sennheiser’s Palonen. “They’re looking for those that they can maintain efficiently, that will deliver superior sound quality and which will last them awhile. No more ‘a headset is a headset.’”

Suppliers are making their offerings even more rugged and wearable. Jabra’s new BIZ 2400 has gold-plated microphone contacts which are five times thicker than most headsets, which eliminates deterioration over time and minimizes distortion for optimum voice transmission. It also has a 360-degree-rotation boom arm that eliminates breakage. The set is made with a surgical steel finish that gives maximum strength and durability. The cords are Kevlar-reinforced to protect against kinking, damage, and breakage.

The BIZ 2400 offers more wearing choices for greater comfort. Three flexible wearing styles: earhook, neckband and headband lets users adapt them to their preference including right or left ear. There is also a new T-bar designed to avoid hair entanglement.

“We want to enable our customers to lower their total cost of ownership and maximize their IT investments through reduced support and replacement costs,” says David Grazio, director of channel marketing at GN Netcom, owners of the Jabra line. “We’ve backed this up with a three year warranty standard with the BIZ 2400 model whereas other products have only two years.”

Wireless Unification

Most contact center agents will likely continue to use corded headsets for the time being, though, because there is little reason for most of them to leave their workstations. For those who do need to be mobile: to reach file cabinets, meet others and attend meetings, or who work from home – and for their supervisors who are wanted everywhere – there are new-feature-rich cordless sets.

UC has led headset firms to develop what Frost & Sullivan’s Saayed calls “one-headset-fits-all” wireless sets that integrate voice modes: conventional line, cell and recorded messages, and laptops and VoIP-enabled computers into a single device. These hybrid or multiuse headsets are equipped with toggles to let users switch between these channels and boxes.

Jabra has unified wireless with corded sets that provides for a more complete service experience. The BIZ 2400 features built-in Bluetooth connectivity that allows users to selectively switch between PC softphone and mobile phone calls. Here’s



an example how this tool can work. A caller dials in with a tough-to-resolve issue that the agent then IMs a subject matter expert on. That individual then calls the agent back on their cellphone. The agent places the customer on hold, gets the information from the expert, then relays the solution that resolves the problem.

More firms are buying cordless headsets connected to digitally enhanced cordless phones, pushing away Bluetooth-enabled devices. The reasons include less interference within high-density configurations like offices. Headsetplus.com explains that Bluetooth hops through some 70 available channels looking for Wi-Fi which can lead to users colliding on the same channel. DECT systems in contrast perform well in such environments.

DECT also provides greater range: 300 feet to 400 feet compared with 40 to 60 feet with standard Bluetooth. That bigger radius enables a manager to go to another office, meeting or to lunch anywhere in an office and still stay connected.

"There will still be a large room, though, for Bluetooth headsets in terms of connectivity," Saayed points out. "A Bluetooth headset can connect with up to seven different devices, while DECT headsets can only connect to their own base stations. You can't switch between calls coming in through the ACD and that through a cell with DECT set but you can do that with a Bluetooth set."

Plantronics offers the best of all worlds including desktop phones with its designed-for-UC Savi series that features two wireless headset systems: Savi Office and Savi Go that mix and match DECT and Bluetooth. Savi Office provides a single wireless headset for mixing PC audio and softphone calls with traditional desk phones; users can switch at a touch of a button. It uses DECT to give it 350 feet of range.

Savi Go's wireless headset connects to PC and mobile phone communications via a plug-and-play Bluetooth adapter that provides life-like, wideband calling through any UC application. The Class 1 Bluetooth solution provides up to 200 feet of range. The Savi Go headset includes multipoint technology that allows users to switch between their mobile phones and PC calls with the touch of a button.

Home Applications

The IP/UC, quality, and wireless feature benefits in these new headsets are literally brought home for at-home agents and supervisors, and more work is being done at home thanks in part to IP that lowers communications costs. Home offices do not have the general high roar in busy contact centers that require noise-cancelling mikes. Yet they have their own unique noises that are often sharp,

distinct, and noticeable, like dogs barking, children crying, family members yelling, cars starting, and lawnmowers and leafblowers roaring. That requires headsets that can mute these sharp sounds.

The quality design, and comfort with headsets come into play even more so with home agents. If the appliances break down or the users are not happy with the units they cannot as readily obtain another professional set with equal features without long drives to specialized dealers.

Headset manufacturers have responded with features that are especially helpful in home environments. Jabra's sets are equipped with PeakStop, an electronic peak control gateway transistor that does not allow sudden excessively loud sounds to pass to the wearer's ear and in doing so limits sharp background noises to customers. It also helps lower average noise levels. A too high level of noise from machines – and even from high volume speech through headsets – can over time lead to inconveniences such as hearing fatigue and stress, jeopardizing employee productivity and commitment.

"The need for quality, reliability, and durability in the headset itself comes into play even more so in a home office environment because you don't have the IT support there," explains Jabra's Grazio. "So it had to be a product that the home agents feel confident in and which should be user-friendly, easy to use and easy to manage over time."

Contact centers should consider equipping their home staff with wireless headsets to utilize their unique environments. At-home workers are just steps from their dining areas, which means with them they can stay in touch with their colleagues and supervisors. Wireless headsets also permit them to stay connected when they have to handle the unavoidable of home work such as signing packages and letting in and paying contractors. Bluetooth is ideal for home environments because headsets equipped for it provide multiple connectivity while interference issues are practically nonexistent.

"At-home agents need to be hands-free much more so than those in bricks-and-mortar centers," Grazio points out. "They need high-quality wireless headsets to permit them to be just as effective at home as they are on site." **CIS**

The following companies participated in the preparation of this article:

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By Tim Searcy



Being Present to Win

I love contests and drawings that say “must be present to win!” They are laying it out for what it is: a clear albeit shameless ploy to have you come to the spot of the drawing at a specified time. They want you to be there, and the payoff is that you may win a prize.

Conventions like the ATA Annual Convention or [ITEXPO](#) are similar. You have to be present to win. What do I mean by “win”? I mean to get everything out of the event that it has to offer. To be present means to show up with your head in the game and ready to engage. Here are the keys to being “present” at any event.

1. Go to sessions and interact with the attendees, panelists and speakers. I speak several dozen times per year, and nothing makes me happier than to spend time answering questions after one of the speeches I give. To actually interact with a participant and make sense of some detail so that they get the most out of my content is great. The sessions this year are awesome, but don't let the session be the end of the learning. Get the cards of the people around you, ask questions of the speaker, and follow up with a note to begin a dialog with this industry expert.
2. Make an investment. I know that it is self serving to encourage attendees to also sponsor or exhibit, but this stuff works. At ATA, and I presume the same goes for ITEXPO, exhibitors and sponsors are going to receive the brand awareness and encouragement that makes the investment worth it. Whether you are rebranding the firm, or launching a new product, or simply preserving what people already know, a little sponsorship goes a long way, and a big sponsorship can put you on the map.
3. Talk to people and give them your business card. Strange to me, but lots of people forget their business cards when they go to a convention. I know in part it is a fear of becoming a salesperson's target. However, that is the price of real participation...to make yourself accessible. Ideally, you will write the type of follow up and topic on your card before simply handing it to someone. If you take a pen and a moment of your time, you can make the further interaction meaningful and appropriate as you define it.
4. Go to everything, including all the receptions and the open hours in the exhibit hall. You have paid good money to be at the convention or conference, and to spend your time in your room working on a proposal or on your Blackberry responding to e-mail and IM's is a waste. Put the other headaches of daily life aside, and truly show up to the convention. There is always lots of planned fun in these few days of activity. When in doubt, go to the fun stuff and have fun. Introduce yourself to people, and ask questions.
5. Plan your work and work your plan. This may be the most trite and overused comment I have given to salespeople for a decade or so, but it still holds truth. When I work with salespeople, I insist that meals are scheduled with prospects or current clients. Every break should have a scheduled meeting as well as drinks before the social events. I am looking for four to six scheduled meetings per day for every day they are going to be there. Additionally, I don't want any more than one third of the meetings to be scheduled with current opportunities. Your firm is already going to spend plenty of money on current clients in your offices or theirs. Sure, you have to “cover up” your clients as a defensive mood to poaching, but these events are and should be about new business.
6. One last piece of counsel: Based on watching many of the so-called trade show “warriors” in the trenches... stop talking to each other. You can't buy anything from each other, and complaining about too little traffic or too little quality traffic just makes you look like someone without a plan. A little camaraderie is a good idea, but then get back to the warrior side of your task, and go out and find some business.

Anyone that goes with a plan for a conference usually has a successful event. Figure out what sessions you want to attend, people you want to meet, and leads you want to generate. If you are not sure how to get your goals accomplished, call me or a member of the ATA staff at (317) 816-9336 or at my e-mail at tim@ataconnect.org and ask us to help. **CIS**



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The 2009 Speech Technology Excellence Awards

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Speech technology is becoming a prominent voice in customer interactions. Customers are increasingly having “conversations” via their landline and ever-more-common their mobile devices and through kiosks with computers through more powerful, functional and user-friendlier interfaces. Ones that are also becoming gradually more affordable, adaptable, flexible, versatile and easier to install, go live, and sustain with each new solution and version. The successful applications and products are those that attract and keep calls automated, thereby saving huge sums in labor and related facilities costs which at the same time provide superior customer-retaining service.

There is a growing realization that DTMF (i.e. TouchTone and speech recognition technologies) – long thought of as competitors – are in reality complementary in today’s environment. Organizations are figuring out which speech solution type is best at meeting specific needs and requirements. For example, DTMF is best for replying with personal data like credit card numbers while speech recording cuts through long menus to get to answers quickly.

Then there’s the advent of speech analytics software that mines call recordings for data, which can be used to improve agent performance, boost customer satisfaction and gain new insights into customer behavior. Organizations can then use this insight to drive important business decisions. These tools too are becoming price-savvy, and right-sized as well as feature-rich to enable enterprises to bolster their bottom lines.

Customer Interaction Solutions has covered call center technology for almost three decades. The magazine has seen the progression from ancient predictive dialers, recording systems, and full CTI integration to IP-PBXs with remote VoIP contact center agents.

“Winners of the Speech Technology Excellence Awards have demonstrated to the editors of *Customer Interaction Solutions* that their products are exemplary in the speech technology industry. These products have proven superior capability and ultimately improved the bottom line for customers,” said Nadji Tehrani, chairman and founder of TMC, publisher of *Customer Interaction Solutions*.

“With new products and whole new categories of products in the contact center space, it is tough for our readers to keep up with the latest and greatest products and services. The 2009 Speech Technology Excellence Awards offer a way to distinguish those companies successfully embracing technologies that give them the competitive edge over contact centers failing to embrace speech solutions,” Tehrani added.

The 2009 Speech Technology Excellence Awards recognize companies that have made significant contributions improving speech applications for their clients. Here are this year’s winners:

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<http://www.VoiceForge.com>
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Salute Veterans By Hiring Them

For its Tommy this, an 'Tommy that, an' "Chuck him out, the brute!" But its "Savior of 'is country" when the guns begin to shoot.

– Rudyard Kipling

Anyone who has served or who has had family and friends serve their country through the military can relate to this famous poem. My grandfather was a “Tommy”: a British soldier who underwent the horrors of The Somme in World War I. My father was in the Royal Air Force, “National Service” or conscription after World War II, maintaining ultramodern jet fighters and bombers in the Cold War.

Because one of the unfortunate facts of being in the military is that it is often very difficult to obtain employment when one is “demobbed”, or demobilized. It is as if companies are afraid of veterans: that there is something spooky about hiring someone who has faced and administered death. Yet this is the ultimate insult: turning away those who put their lives on the line for their country so that those who shooed them out the doors did not have to face the suffering and death as they did to protect their freedoms.

As a result many veterans cannot find work, even more so than civilians, especially in tough times. The U.S. Department of Labor reported in September that 11.3 percent of Iraq and Afghanistan veterans are jobless compared with 9.7 percent nationwide. An article in the Sept. 9 Pittsburgh Post-Gazette that reported the data summed it up accurately: “So much for taking care of the nation’s returned heroes, who are finding it harder to land a job than the average American.”

Service-disabled veterans have it the worst, even more so than their civilian counterparts. They face the double-whammy of unease about their disabilities along with that of their military experience. Many cannot find employment or take back their old jobs because their injuries have robbed them of their skills.

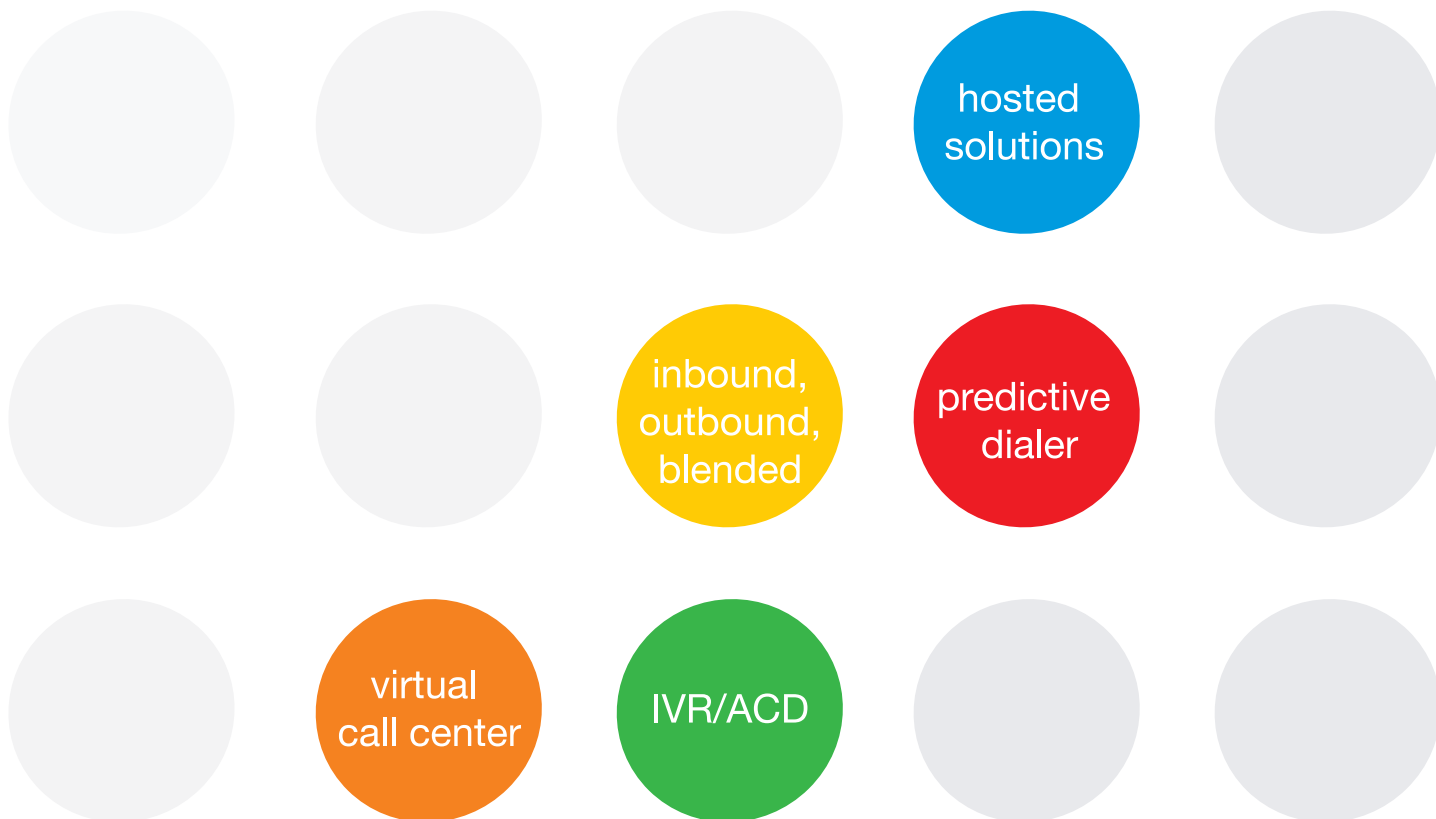
Being in the military does change a person, I’ve been told (I had thought of enlisting in my youth but I have wonky coordination and two flat feet.) There are few substitutes for the mental and physical fitness of knowing how to and surviving under fire, in learning teamwork, leadership, quick thinking, resourcefulness and courage – qualities that employers should welcome, rather than ignore.

Contact centers are in an excellent position to change this deplorable milieu. They provide a wide range of opportunities via customer care, sales, billing and supervisory positions for vets to demonstrate their skills. The advent and widening availability of home working and accessibility tools such as the JAWS screen readers are enabling disabled ex-service personnel to be employed from anywhere.

For the value of home work just ask Major (Ret.) Jack Heacock, a service-disabled vet who was awarded the Bronze Star in Vietnam when he served with the U.S. Army Signal Corp. He developed and has taken his passion for distributed work to become a leading telework expert. He is co-founder and senior vice president of telework education and advocacy organization The Telework Coalition.

There are many enlightened contact center departments and outsourcers that are employing veterans. That rank includes organizations such as Purple Heart Services that provides outsourced customer support by recruiting, training, and managing combat-wounded and disabled vets. The unit of vet-supporting employers also encompasses companies such as Amtrak, Citicorp, Comcast, InfoCision, Wells Fargo and West that participate in the U.S. Army’s Army Partnership for Youth Success program. Army PaYS recruits employers to provide employment to soldiers who are leaving the service; they must sign up for PaYS upon enlisting.

There needs to be many more organizations recruiting veterans and in greater numbers, and more military services branches should have programs like the U.S. Army’s PaYS. There is no more appropriate, effective, productive, and respectful way to honor those who have served with honor by offering them employment opportunities when they rejoin the ranks of those they had put everything on the line to defend. **CIS**



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