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Rich Tehrani, *CEO, Technology Marketing Corp.*

Magazine Founder Nadji Tehrani Hands the Baton
as Contact Centers Meet Social Networking

Thank you Nadji for allowing me to contribute in the space you have written in for decades. While filling your shoes will never be easy – what I have learned from you should help guide me, TMC and our readers well into the future.

I have been extremely fortunate in my life to do something I love, have a passion for and all the while get, paid for it. From a very young age, I was allowed by my father to come to work on school vacations so I could work and earn money which was split evenly between Space Invaders at the local arcade and a new multi-thousand dollar stereo system which I still own. I did my mailroom job with the brochures of Vector Research (a now defunct company which built receivers) and Bose on the wall in front of me.

At my salary, it took many years to save enough money for a stereo – once you account for all the quarters I spent killing aliens and asteroids that is.

Later on I was very fortunate to be given an opportunity to sell advertising and found I had a passion for meeting people and learning about new markets. In addition, I parlayed my love for video games into actually writing them and although I never sold any commercially, I taught myself how to solve real problems using a computer.

In high school I transferred this knowledge to TMC where I programmed the databases which powered the company using the BASIC and later Informix 4GL programming languages. I was intimately involved in the contact center space and I really saw it blossom. When my father Nadji embarked upon the launching of a magazine in a new area, technology was not a factor. Call center agents relied on paper to keep track of their contacts and it is amazing to see how the industry has evolved over so many years and now employs millions.

While the technology has evolved, the most important part of the market to me has always been treating workers and customers right. If you do right by your customers you will always do well… that is what stands out in my years of involvement in these markets.

Of course, since the advent of the ACD, technology has become an important part of serving customers and the challenge today continues to be how to keep customer happy while leveraging the Internet, blogs, social networks, Twitter and Facebook.

And as I think back to the beginnings of this publication which Nadji thought to launch in 1981, I can't help but feeling deep and humble gratitude for the opportunity my father Nadji has given me.

I feel privileged to not only fill this space, but to have had the decades to spend entire days with my father learning his unique approach to business and relationship-building. My challenge is to fill the shoes of a person who left Iran – a country where they read right-to-left to come to America around 20 years of age and start a publishing country with English as his third language – and he started learning it once he got here.

I figure to get started on this Herculean task I should make a bold prediction about how contact centers will evolve for the next few years. My prediction is social media will begin integrating with contact centers and unified communications in a way which continues to alter and enhance how customers and companies communicate.

In the process, there will be a heightened level of transparency in what companies are doing and how they solve customer problems. The Internet will continue to open up processes that were once hidden. Already we are seeing computer manufacturers share information about products which are in the process of being built for customers. This has been taken to the next level with companies like Quirky.com, which allows customers to submit product ideas and further allows other customers to promise to buy the theoretical products before they are even built.

Social network monitoring too will become a crucial part of every company's activities. Today, if you aren't aware of what is being said about your company, you may not make. I have cancelled countless purchases based on high-ranking negative product and service reviews.

If among the top search results for your company is a link to a social networking site with customer complaints, you are in real trouble.

So the next decade will be about integrating your contact center and customer facing departments with social networking services in a way which benefits your company. In my opinion, this transition will be even more wrenching than the one to IP communications and it is more complex and involves integration with new channels of communications you don't control like Twitter, Google and Facebook.

And as this massive transformation happens, keep reading… this column and publication will help lead the way.

Nadji Tehrani is still very involved with TMC. A founder and chairman, he helps guide TMC as it navigates the exciting waters of new media. He can be reached at nadjitehrani@tmcnet.com **CIS**

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Erik Linask, *Group Editorial Director, Technology Marketing Corp.*

Do Your Customers Know How to Reach You?

Nuance Communications recently published the results of a study it commissioned from Forrester Consulting, called "Driving Consumer Engagement with Automated Telephone Customer Service."

One of the key findings was that, by and large, consumers prefer automated self-service solutions for most basic, straightforward concerns. It's true, and how well have organizations followed this model?

Look at Cablevision, for instance. From time to time (far too frequently, IMHO), customers lose their image, though this can often be resolved by simply firing off a signal to the set-top box. In fact, Cablevision now requires a call to its customer service number simply to activate a new box, which I don't understand, but that's a question for another issue. For years, in order to resolve the issue, customers had to wait on hold to speak to an agent, who would then manually go through the process of asking for account information and the nature of the problem, and then send a signal to the box. Most times, the picture would reappear and all would be well.

Now, anyone who truly understands the complexities of technology also realizes that these issues are bound to arise – it's the nature of the beast. But, those calls and wait times were, at best, a nuisance. Cablevision, however, has come to its senses – at least regarding this scenario – and added menu options to its customer support line that allow customers to relatively easily identify their problem and have a signal automatically sent to their boxes, more often than not resolving the same problem.

The fact that the total time to resolution probably doesn't differ by all that much – perhaps only a minute or two if the call queue is reasonable – is immaterial. For customers, the ability to resolve the problem on their own, without enlisting the help of a live agent holds a higher value than the resolution itself. Score one for automated self-service.

On the other hand, if that doesn't work, try getting to a live agent. Then try again. And again.

And when you finally get a live agent, get ready to provide your account information to each new person with whom you speak.

Which part of such a situation is more frustrating is debatable, but what should concern contact center executives is that they both are. What we do know, however, is that customers want to be able to reach an reach an agent when they want to. The Forrester study confirms that: Two-thirds of respondents value the ability to get to a live agent at any time. What this means is that customers need to know very early in their interaction how they can get to a live agent – whether by pressing a specified key on the phone, by clicking on a chat button online, or by entering a callback number into a field. It has to be easy.

I just listened to a presentation by Shai Berger, co-founder of start-up firm Fonolo, who was one of four presenters at the first StartupCamp Telephony at ITEXPO. His basic premise, upon which he hopes to build his business, is that contact centers are fundamentally flawed because most do not leverage technology effectively to create a simple interactive process for customers, resulting in longer calls, more calls, multiple transfers between agents – all of which results in aggravated customers and cost the company money.

Berger says that phone menu navigation is among the biggest sources of contact center inefficiency. But, he also says the challenge can easily be overcome by simplifying menus and making it easy for customers to reach live agents, regardless of which communications channel they use to initiate interactions.

Of course, simplifying phone menus will help in many cases – but only if customers' first instinct is to pick up the phone to dial. Increasingly, the initial interaction happens online – if only to locate a customer service number. Instead of simply providing a single access number, Fonolo's proposal is to develop a visual representation of the phone menu, which allows customers to quickly navigate their routes through an IVR system – without having to wait for countless menu options – and then click on the most appropriate menu option to immediately reach the agent that is most likely able to respond to their needs.

Berger's goal is simple: He wants to change the way customers engage businesses by fixing the inherent flaws in communications channels. By leveraging telephony automation and cloud-based communications, he believes the time to resolution can be significantly reduced, resulting in considerable increases in customer satisfaction while reducing operating costs for contact centers.

Success is dependent upon customer satisfaction, and the only way to achieve higher levels of satisfaction is to make customers your highest priority. Companies like Fonolo understand how to integrate the latest technology trends with traditional support mechanisms to optimize the customer experience. **CIS**

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by Brendan Read

Open Mind On Open Source

Open source contact center software: applications written to source code with few if any copyrights can be a little unsettling to managers who are used to conventional proprietary solutions. Yet if they keep an open mind and are willing to look into open source they may find that it could provide additional functionality at lower costs.

Open source is different from other software in that the core code is generally free and that it has a community of developers and users that works with it to create new applications and solve problems. Open source software can be completely no-cost and is usually available under general public licenses (GPLs). GPLs are an example of "copyleft" – a licensing scheme which, says Wikipedia, can give every person who receives a copy of a work permission to reproduce, adapt or distribute it: as long as any resulting copies or adaptations are also bound by the same copyleft licensing program. Yet they would require skilled internal or outside resources to turn them into specific proprietary-equivalent applications.

Open source is also available via paid commercial applications that built on it supply added functionality and provide formalized support. Many firms that offer commercial solutions based on open source also make available GPL or "community" editions. For contact centers focused on performance and reliability with little room for experimentation, commercial open source is arguably the best option.

Open source is loosely similar to living in a co-op building where the ownership is different i.e. shares rather than units and there is an active community developing and maintaining the shared product.

And just as co-op ownership is common, proven and accepted in large urban areas like New York City the same goes for open source.

The Linux operating system that is at the heart of many platforms is open source. The Cisco Unified Call Manager/Media Convergence Series 7800 series phone system gives customers the choice of Linux or Windows. Open source code has also been deployed as part of industry-specific applications. The Avaya Dialog Designer, which is an integrated development environment for Avaya Voice Portal and Avaya Interactive Response, is based on the Eclipse.org open source development framework. Dialog Designer offers Web application developers a reusable drag-and-drop environment for speech and video self service application creation.

There is also a widening array of increasingly versatile "direct" commercial open source contact center and enterprise solutions. They provide key functions such as CRM, ERP, IVR, recording and routing/switching, available both on-premise and cloud-delivered.

For example, KnowledgeBlue makes openBLUE, which is an on-demand open source solution that supports functions such as CRM, ERP and Web commerce. It enables accounts payable/accounts receivable, billing, budgeting, multilanguage handling, order entry, partner/vendor management and payroll. It provides an open architecture so that organizations can access their own data, reports and customizations. KnowledgeBlue also offers voiceBLUE, which is an integrated contact center/CRM/contact management solution also available as on-site appliance as well as on demand.

Even so, contact center managers are right to be a little cautious about open source. Compared with proprietary solutions there are relatively few products and suppliers. They need to determine whether there is a compelling value proposition in open source software compared with proprietary solutions for their particular environments.

Open Source Benefits

In today's environment, where contact centers are being pulled to boost customer retention and sales and pushed to cut costs, the key benefits with open source are flexibility and scalability argues, Martin Schneider, director of product marketing, Sugar CRM.

Open source solutions are better able to integrate with existing platforms than

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proprietary tools by definition, without costly integration or rip-and-replace that is required with standard applications, he points out. This enables step-by-step improvements, such as routing calls to home agents and to subject matter experts via presence, and boosting call recording and IVR capacity, while keeping existing operations going with minimal strains on budgets.

“With open source you can slowly transform from a traditional hard switch, hardwired older proprietary-software-based contact center operation and phase into a modern and more scalable software and IP-based one cost effectively,” says Schneider. “Using open source will cost you less in the transformation and maintenance than with new proprietary products to achieve the same results.”

Another key reason for going the way of open source is product obsolescence protection. Bankruptcies, mergers and acquisitions and corporate decisions prompt and cause ending software lines and direct support for them. For example Sugar has a large deployment for a client, Convatec which switched to it because its Vantive deployment was no longer being supported; Vantive had been acquired by PeopleSoft, which in turn was purchased by Oracle.

“The product support model is becoming very confusing with the deals,” says Schneider. “The risk for customers is that if or when these any of these products become phased out and there isn’t an open sourced project in any of these plays there is no fallback policy by which customers can continue to have them supported.

“In contrast if they have ours, for example, or in the switching case, a Fonality Asterisk-based open sourced switch, you have risk mitigation because you can get down the software kernel to fix problems or build on the solution. You can also get support from the open source community. The same risk mitigation also extended to hosting firms that buy and use open source solutions.”

The last key value proposition for open source is lowered costs. This is most apparent in free editions though Schneider advises using them only if you have the IT expertise to build and support robust applications. SugarCRM’s Schneider points out that with commercial open source applications like SugarCRM Professional the price savings is marginal compared with competing products. Even with commercial solutions the savings can be enough to take allocations that normally go towards user licenses into customizing the applications, thereby achieving greater productivity.

“Direct cost benefits are the last thing you should be looking for in open source,” Schneider advises. “Instead, the gains are in the increased flexibility that saves huge sums in consulting and integration when installing proprietary solutions. You should take the costs of a proprietary solution and consider it as ‘X’ and then look at open source. The initial kind of cost may be ‘sub-X,’ but you need to think of it as budgeting for ‘X’ because with open source you get that extra room to do some customizations and integrations such as process flow modeling that provides more consistent multichannel service.”

As an illustration of open source speed, flexibility and savings, Bruce Kaskey, co-founder of OrecX, says that anyone anywhere can download the GPL version of his firm’s Oreka TR IP-based recording solution and go live within 30 minutes. If they purchase the commercial version that includes contact center grade voice recording, quality monitoring and screen capture solutions versus proprietary recording tools they can go live in 45 minutes to one hour. In contrast, implementing proprietary solutions takes one to two days.

“Through all the work of our community, we have developed a call center grade voice recording, quality monitoring and screen capture solutions for a fraction of the price of our competition,” says Kaskey. “Since our products’ core code is open source it is agnostic to the operating system, thus we can load it on any server anywhere with no integration hassles or added costs.”

New Open Source Solutions

There is a growing range of open source-enabled enhancements and solutions on the market. Among them:

- Braxtel Communications is developing the ContactQ open source contact center product both as a supported commercial and as a free GPL project. ContactQ will feature a Linux based platform that will provide IVR, ACD/contact center, extensive live agent and supervisory displays as well as detailed and customizable management reporting. As it is open developer communities can build value into the ContactQ value proposition. Embracing standards including SIP, Voice XML, AJAX (Web 2.0), and XMLRPC it is designed for inter-working with VoIP softswitches such as Asterisk, FreeSWITCH, Nortel and Cisco. It can be deployed as a premise-based and as a hosted solution.

- SugarCRM’s new CRM platform, Sugar 5.5 includes a new Web services framework, platform improvements and the ability to create custom themes. It also has enhanced mobile features such as customization capabilities to optimize SugarCRM for mobile devices with pre-built layouts and views for modules.

- Xorcom has partnered with OrecX to offer an open source utility that records calls from PSTN and IP sources, along with identifying information, such as caller ID and destination extension. The joint solution is combination of a patch Xorcom developed for Asterisk open source IP-PBX and OrecX’s Oreka GPL VoIP call recording system. It gets around a limitation on the number of simultaneous recordings on Asterisk because of the stress this activity places on the PBX processor by placing the recording application on an external server. OrecX also allows customers to make OrecX's Oreka TR commercial applications speech analytics-ready for most commercially available speech analytics engines.

Open Source Concerns

Open source software used to be more problematic than proprietary solutions to install and support. The free products require extensive internal or consulting expertise that – unless it is already available in a firm – risk leading to them ending up costing almost as much as buying and supporting the proprietary-written competition. Commercial open source products have now been developed and have evolved to the point where they are equal to and often have an edge on the non-open-sourced offerings.

"With open source, you do have the option if you are stuck on an install or with support to go outside the supplier and integrator to get answers," Schneider points out. "While you can make changes in proprietary versions (not always) but the process is longer, requires more technical expertise which usually involves an expensive consulting engagement, thereby driving costs up."

Another key issue, one that is not so much technical is the limited numbers of open source products especially in the contact center space. For example, there is apparently not as of yet an open source workforce optimization solution.

SugarCRM's Schneider thinks more open source products like for WFO will come onto the market. Even though the contact center sector is mature it is changing with the shifts to IP from TDM, and toward home and informal agents, which presents opportunities. It is more then sensing opportunity by the right entrepreneur at the right time rather than marketplace pressure. He cites his own firm that entered the CRM space where there were already several prominent players and became successful.

Schneider also points out that while the technical proof case for the viability of open source has been proven, adoption cycles are long. Even so, companies like Sugar are landing thousands of new customers per year; there are millions of businesses that could potentially make the switch to more open solutions. That also includes to using hosting firms that deploy open source software, though given the SaaS model pure code-level access cannot be granted to end users or developers.

"I would argue what we are seeing is a shift in the way all businesses create, distribute and manage software: shifting towards open development and other aspects of open source," says Schneider. "While open source vendors are not currently dominating the marketplace, it is only a matter of time as we are only about five to 10 years into the history of commercial open source in the application layer."

Marketplace Acceptance

The customers have spoken and their words are being echoed by other contact center solutions suppliers that use open source software in their wares indicating a rising degree of marketplace acceptance. Fonality reports that its Asterisk-based PBXtra Unified Agent product, which combines phone system, contact center, plus CRM capabilities via an integration with Salesforce.com has been very successful since its announcement in late 2008.

OrecX's Kaskey point out that there have been over 48,000 downloads of the Oreka TR GPL software; the firm has over 20,000 end users. His customers have achieved success with the open source solution. One of them, Cross Check Communications, saved $292,000 with a cumulative savings of $300,000 over the next four years with the Oreka TR recording system.

He acknowledges, though, that a major challenge for any open source code company is credibility. Proprietary software and hardware firms have developed their brand and customer base over the past two decades, so open source companies are always battling the "who are yous?"

"We respond by allowing customers to try the software for free for 30 days without any type of commitment," says Kaskey. "This gives our customers confidence and proof that we are who we say we are."

There are companies that can help firms manage open source applications to ensure they achieve maximum benefits. For example, OpenLogic's OLEX Enterprise Edition identifies open source alternatives to proprietary software to save money. It integrates open source provisioning, policy enforcement, online approval processes and full tracking and audit trail of open source usage from "cradle to grave" download to distribution.

"As more enterprises increase the use of open source software due to economic conditions prudent enterprises are demanding cradle to grave open source governance," says Kim Weins, OpenLogic's senior vice president of products and marketing. **CIS**

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Fonality www.fonality.com	**SugarCRM** www.sugarcrm.com
KnowledgeBlue www.knowledgeblue.com	**Xorcom** www.xorcom.com

CUSTOMER INTER@CTION NEWS

- **Aastra (www.aastra.com)** has launched a new version of its Solidus eCare multi-media contact center solution. It offers InTouch, a new unified communications client, offering presence, corporate directory searches and instant messaging. It is also offering Solidus eCare Lite, a downscaled version of the solution designed for businesses with smaller contact centers (50 agents or less) that keeps most of the same functionality of the larger version.

- **Calabrio (www.calabrio.com)** has come out with a new Recording Controls application for customers using Calabrio Compliance Recording and Quality Management or Cisco Quality Management software. New phone- and Web-based controls provide on-demand audio recording control and annotation capabilities. Through their Cisco IP phone or browser-based controls, users can start, stop and pause a recording, as well as associate metadata with recorded calls, which makes search capabilities faster and more precise. They can add up to 10 customized metadata fields to associate with a recorded call, such as customer names, transaction results and call classifications.

- **Cisco (www.cisco.com)** has come out with a wide array of new and enhanced communications solutions. Cisco Unified Communications System 8.0 includes advanced integrated IP applications, federated presence across devices and platforms, instant messaging, customer care, conferencing, video and mobility capabilities. A Cisco-hosted directory of organizations and locations with Cisco TelePresence simplifies the scheduling of intercompany virtual meetings. A new enterprise social software solution includes a social video system that helps enable secure video communities around user-generated content under enterprise control. Cisco's hosted e-mail offering now allows IT to move to the cloud (i.e. hosted) while leveraging their current investment in the Microsoft Outlook client.

- **eOn (www.eoncommunications.com)** has debuted eConn IP-PBX. It can serve enterprises with as few as 10 employees to as many as 1,000 employees, in single or disparate geographical locations. Desktop appliances include eOn's eNterprise 7000 Series IP Telephones, audio conferencing units, analog sets and third party SIP-compliant devices, comprised of softphones, desktop phones, Wi-Fi and IP DECT wireless handsets. Other features include flexible ACD routing for up to 576 local and remote/home agents and multi-site networking.

- **Interactive Intelligence (www.inin.com)** has released the Interaction SIP Station, a new communications endpoint device designed as an affordable, reliable and simple alternative to IP desk phones. The Interaction SIP Station has no hand set, display or dial pad. Instead, the unit works in conjunction with a headset and the Interactive Intelligence Interaction Client, a PC-based call control software application that includes call recording, call rules, conferencing, presence management, company directory look-up, queue monitoring and call history. The Interaction SIP Station consumes less desk space than a traditional phone. It is also more secure and simple to use. The device's physical buttons include pick-up/disconnect, mute, volume control, emergency speed dial, and a multi-function status LED. It uses power over Ethernet thus further enhancing reliability by making it easier and more efficient to supply back-up power.

- **KnoahSoft (www.knoahsoft.com)** has come out with Harmony 3.0, its newest recording/performance management suite. It offers a flexible, open reporting architecture, running against native and external data sources. It has PCI-complying security support via advanced encryption, tight integration and synchronization with Active Directory and enhanced password policy settings with full audit trail tracking and reporting. There is full redundancy that ensures 100 percent recording support for multiple, mixed environments and diverse deployment models including VoIP and ranging from at-home, traditional contact centers, and branches.

- **LiveVox (www.livevox.com)** now enables organizations for reportedly the first time to establish skills-based routing with dynamic blending of inbound and outbound campaigns for every contact center station via a single Web-based, GUI-tool configurable solution. Contact center managers or IT groups can quickly and easily place agents into multiple tiers and route both inbound and outbound calls through the Web-based LiveVox system, even if agents change workstations day to day. These can be changed or altered as agents gain experience, new agents are hired or new contact centers are brought online.

- **Nexidia (www.nexidia.com)** and Merced Systems (www.mercedsoftware.com) have partnered to provide integrated agent performance solutions. Conjoined Nexidia's Enterprise Speech Intelligence speech analytics and Merced Performance Suite and Merced Incentive Compensation Management performance applications will help mutual customers to more accurately identify the root cause of performance issues. Contact centers can then quickly roll out targeted improvement campaigns based on accurate "voice of the customer" analysis. With direct access to individual agent calls, operations can link specific call recordings to performance improvement opportunities.

- **OAISYS' (www.oaisys.com)** new Tracer version 6.0 has several feature enhancements over previous products. An integrated Live Call monitor allows users to connect to one or more Tracer systems, each with up to 192 channels; an

Auto Call Monitor provides real time automatic live call monitoring. A live annotations and coaching tool enables supervisors to add text annotations directly to calls during live monitoring, permitting their observations to be captured in real time. Tracer 6 also has quality control work queues allow users to create rules for the count and types of calls that supervisors must evaluate. An automated call organization feature identifies calls that meet set criteria based on call filters, such as agent ID or extension lists, and categorizes them within a specific search folder.

- **Salesforce.com (www.salesforce.com)** has unveiled Salesforce Chatter, which is a new secure enterprise social network-based collaboration application and social development platform. Salesforce Chatter permits profiles that include contact information, areas of expertise, work histories and photos. A feeds feature allows real time updates to keep everyone informed of what they are working on. Group functionality permits employees to create their own groups within Salesforce Chatter and share updates and content. Salesforce Chatter leverages Force.com's multi-tenant sharing model, enabling companies to decide which employees have access to what information. Salesforce Chatter permits users to filter the most relevant Twitter feeds into their Chatter application. Employees will also be able to pull information from their Facebook profiles to auto populate their Salesforce Chatter profiles.

- **SysAid Technologies (www.sysaid.com)** new SysAid IT 6.5 help desk software features live chat, which enables IT administrators to communicate in real time with end-users, permitting them to conduct several different chat sessions simultaneously. The software also includes an improved graphical user interface along with IT Benchmark. The last item is a new tool that helps evaluate IT performance with hard ratios and statistics; it allows managers to compare their support centers' figures with thousands of other IT departments worldwide. **CIS**

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by Brendan Read

The CRM Evolution

Customer relationship management (CRM) has been undergoing an evolution. The rationale for this method has expanded from reducing costs via targeting sales and retention resources on the most valuable customers to growing revenue by enhancing the customer experience. To accomplish this, firms increasingly want flexible solutions that can generate results quickly but which have robust enhanced functionality to support mobile and multichannel users, including those on social networking sites.

"Although business is getting tight, our clients recognize the importance of customer relationships," says Peter Grambs, vice president of customer solutions practice at Cognizant. "The last thing they can afford is to lose any of their current customers, and they've found investments in CRM paying off quite well in terms of customer retention, prospecting and acquiring new customers. They are turning to newer solutions, especially in the on-demand area. They're looking at smaller budgets, but they are not lowering their expectations around functionality and the type of support services they expect."

Not that cost control is out of the picture. Adam Sarner, a research director at Gartner, sees organizations employing methods such as activity-based costing (ABC). ABC, according to Wikipedia assigns the cost of each activity to all products and services according to the actual consumption to focus resources. In this fashion companies can refine which channels are best to serve specific functions. For example with ABC retailers may find that they do not need to expand CRM capabilities to cover calls if they are a minor part of sales and service interactions.

"Organizations are finding a balance in CRM between strict cost-based approaches that has driven away some customers in the past and between providing all channels to all buyers which delivers the best customer experience overall but not optimal returns," says Sarner.

A La Carte Not Table D'Hote

One of the most important moves CRM buyers and suppliers are making is toward more modular deployments and solutions (a la carte as opposed to table d'hôte), spread out over time on an as-needed basis instead of purchasing and only offering large packages.

Organizations can obtain specific sales force automation (SFA) solutions, support tools, or business process management applications such as for field service, complaint management and returns handling. They can also access them via the cloud either on-demand from suppliers (see sidebar) or from third parties (more about hosted contact centers in the April 2010 issue).

With this approach enterprises can buy only what they need. This helps them manage their budgets, spreading expenses out while seeing results and returns quickly: a few months instead of many months from install to go-live.

"Rather than go for another round of similar larger CRM projects what we are seeing is our clients taking a more cautious, wiser approach to implementations," says Grambs. "They're taking it a piece at a time, chunking it off, going and testing proof of concept, taking bite-size pieces to meet specific needs, and trialing cloud or hosted versions.

They've grown up and matured with the software. They've learned that "big bang" enterprise-wide implementations are just fraught with risk, like any other big software implementations."

Not that older legacy solutions need to be ripped and replaced just because of their age. For the companies that have kept their applications up-to-date and on the current releases, they are fine for the time being.

"However, for those companies who are either on an older version, or are looking at some major business expansion, this is an opportunity to see what else is out there," says Grambs.

To those ends SAP has gone modular and more enterprise-customer-friendly with its SAP Business Suite 7. It delivers more than 150 innovations via enhancement packages and synchronized releases for all applications: SAP CRM, SAP ERP, SAP Supplier Relationship Management, SAP Supply Chain Management and SAP Product Lifecycle Management plus industry-specific tools. These offerings have been designed to allow firms to select and deploy only the functionality they need without upgrading their core solutions.

SAP Business Suite 7 customers can also drive down their solutions' ownership costs by leveraging harmonized user interfaces that present similar views across the applications. This feature delivers a coherent user experience that helps reduce user training effort and cost.

There are new tools that make installing and configuring CRM systems easier and less costly. LoopFuse's CRM Integration Wizard, designed for SFA applications, is a simple four-step process that walks users through in usually five minutes or less: with no need for IT staff or consultant assistance. The wizard validates each step of the way; users can initiate advanced settings with the interface or get additional support and information from contextual articles or readily available community-driven knowledgebase links.

Oracle has been making its CRM solutions more user-amenable while reducing fixed and operating costs. The Oracle VM Templates for Siebel CRM 8.1.1 deliver a quick start – in less than three hours – for a virtualized Siebel CRM, Oracle Database and Oracle Enterprise Linux environment. It also cuts the minimum server requirements from four to just one resulting in lower IT and energy costs plus reduced environmental impacts.

The VM Templates accomplish this by eliminating the need to separately install and set up the operating system, database and Siebel CRM applications. With this come new instances of application modules, application servers and Web servers can also be provisioned within minutes.

The one downside with modularity is the risk of poor integration between functions that can require costly system work. To avoid that, Consona has in Consona Knowledge Driven Support Version 1.0 cemented its Onyx CRM, KNOVA KM and SupportSoft eService suites. The solution provides multichannel access and consistent knowledge from all sources delivered in a unified automatic workflow.

"Consona Knowledge Driven Support saves hundreds of thousands of dollars compared with fully integrating two or more standalone tools," says Tom Millay, general manager of Consona's CRM products. "But unlike the knowledgebase 'modules' that are sold with CRM tools, which provides only a few database tables and keyword search, Consona Knowledge Driven Support provides a robust, fully functional knowledge management application that scales to the complexity of any business."

Heftier Sales Tools

There is a growing focus within firms and solutions on improving sales productivity. To help increasingly untethered sales staff, who are relying more on their smart phones the Mobile Studio Editor in SugarCRM's Sugar 5.5 increases SugarCRM optimization for wireless devices. It has pre-built layouts and views for modules designated for mobile use. Users can select which ones to view in the wireless client and tailor the layouts and fields for the wireless client from within the Sugar Studio application.

Sugar 5.5 also has a new dynamic team capability that enables users to collaborate across individuals and teams on complex projects resulting in quicker, more attractive deals and more attractive service. For example, a user could assign an executive sponsor, professional services team and customer advocate to a given account, rather than assigning the account to an individual sales representative or sales team.

Bernard Drost, chief technology officer, Innoveer Solutions, has seen demand increases for SFA and for automated retention programs that use predictive analytics software. The need is more for the former because it looks toward the future while the latter is focused on the current situation, i.e. lapsing customers.

"Sales in terms of companies getting ready for when the economy picks up," says Drost. "With the slowdown companies also need to keep more of customers' wallet share by retaining and cross-selling/upselling-them. Contact centers benefit when their systems indicate that a customer might lapse such as pulling money out from a bank account and they proactively call the customer to sign them up again. Such detection has become more affordable with CRM applications like Salesforce and SugarCRM that have predictive analytics that can be implemented now because their cost does not break the budget."

The Social Channel

Social media is emerging as a new channel that CRM applications are beginning to address. These solutions are tapping into conversations that are taking place on Facebook, LinkedIn, and Twitter, inside customer communities and portals, and on product and service sites like TripAdvisor, listening and responding to customers and putting forward offers to them.

Salesforce.com has come out with Salesforce for Twitter where contact center agents can feed in tweets relevant to their firms back into their organizations, which then generate and tweet back their responses. This follows up on Salesforce for Facebook released in 2008. Twitter is proving out to be a more interactive channel, says Salesforce, whereas Facebook is having the most success as a marketing tool.

Salesforce has also rolled out "Chatter," which is an internal collaboration tool and a development platform for building social applications. Companies can bring Facebook and Twitter feeds and comment and tweet inside Chatter within context of different groups, such as one team on customer service and another on business development. Chatter also has APIs that tap into other web applications where there are conversations happening such as Expedia, TripAdvisor that can be fed in, monitored and responded to.

"People are already talking about you and your company," Al Falcione, Salesforce.com's senior director of product marketing points out. "Therefore you need to tap into, respond, and join in that conversation."

Knowing more your customers and following what is happening to them is key to CRM and is obtainable via social networking. InsideView and NetSuite have partnered to offer InsideView for NetSuite which allows NetSuite CRM users to have instant access to targeted intelligence harvested from sources such as Twitter, LinkedIn, Facebook, Jigsaw and NetProspex. It also provides access to editorial including Thomson Reuters and Capital IQ directly within NetSuite.

At the same time InsideView for Netsuite helps firms monitor customers' and partners' financial health to assess payment risk and improve collections processes. It also leverages social media buzz to gauge suppliers' brand reputation, customer satisfaction, and service levels and assess supply chain risk.

There are CRM solutions that integrate social media with the other channels, and offered both on demand as well as via on-premise licenses. To illustrate Oracle has integrated inQuira's iConnect knowledge management product with its Oracle CRM on Demand solution; it was first offered with Oracle's Siebel on-premise application. With this, customers can move seamlessly from self-service to live agent-assisted service. Agents receive overall view of customers' issues and actions taken regardless of channel Web, voice, and social networking channels. They can then assist them via having access to knowledge available across the enterprise.

"The other channels will not go away, even if we want them too, not in this decade anyway," explains Gartner's Sarner. "What happens is we learn which channels work best in which situation to facilitate company customer needs."

There is still a learning curve with social media though. Among the issues is the amount of monitoring and support required and by whom. Grambs points out that there is with the social channel, unlike with others, no centralized monitoring; the masses have taken over. That makes many companies uncomfortable: they are used to controlling the discussion and the channels – and they are often unprepared for negative feedback that is rare but which does appear.

Cognizant has put together a "Sentiment Analyzer" for clients that they can program for corporate information and activities for both their firm and their competitors. The tool taps into various social media such as Facebook, and Twitter and monitors the discussions, allowing organizations to dig down and see what people are saying about their companies and their products, good, bad and the ugly to get a sense of the crowd.

"A year ago, if you asked a CIO what they were doing in the social CRM space, for the most part they said, 'I don't even know what that is,'" says Grambs. "Now you are seeing a lot of interest, and many initial forays into various aspects of social CRM. Now is the time to figure out where the opportunities are and how to gain value." **CIS**

The following companies participated in the preparation of this article:

Company	Website
Cognizant	www.cognizant.com
Consona	www.consona.com
Innoveer Solutions	www.innoveer.com
Netsuite	www.netsuite.com
Oracle	www.oracle.com
Salesforce.com	www.salesforce.com
SAP	www.sap.com
SugarCRM	www.sugarcrm.com

Moving To The Cloud?

More CRM solutions are expanding, moving to or are being seeded to the cloud. Sage CRM Solutions is one of the latest suppliers to "fly." It has been piloting a cloud computing edition of the Sage SalesLogix CRM suite for commercial availability this year.

The taking off for the cloud has been propelled by customer demand. The chief benefits are greater flexibility, quick implementation and results, and lower up-front outlays.

Cloud-based CRM solutions have been especially popular with small- and midsized-businesses for those reasons. This method empowers them with sales and service capabilities that enable them to compete effectively with larger firms as well as with each other. It is also ideal for short-term project testing and for discrete functionality such as sales force automation.

The challenge with cloud delivery lies with deploying it on a widespread basis for enterprises. Both suppliers and clients have to manage more integration between CRM solutions and the customers' applications. There are large volumes of data that must be handled, including cleansing. Together they can make on-demand CRM as complicated as the on-premise applications.

"The on-demand applications can work fine for the large enterprises, and they may be somewhat quicker to implement, but for large companies, they are still a major undertaking and it will not happen overnight," explains Peter Grambs, vice president of customer solutions practice, Cognizant.

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from the TMCnet BLOGS

ClickFox

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

ClickFox, which sells customer experience analytics products, has announced what company officials call "the expansion of their deployment" with a telecommunications organization to include "all customer interactions across all of their interaction channels."

The coyly-unnamed wireless provider will use both existing and new interaction analysis to "further improve operational efficiency, customer retention, revenue generation and customer satisfaction."

Marco Pacelli, CEO of ClickFox, notes correctly that the telecommunications industry has "steep competition, high customer churn and highly publicized customer satisfaction issues." Amen, that last one goes double.

Fascinating question, isn't it? Which came first, the lousy customer service, high churn or stiff competition? If customer service were better would churn decrease? Is such a thing possible? What would it look like: increasing the quality of customer service to the point where it actually reduces churn? Interesting question, somebody get Paul Greenberg on it right away... well, when the Yankees game's over.

These issues need to be constantly monitored and analyzed, company officials say, adding that limited analysis doesn't always cut it when it comes to getting insight.

ClickFox officials are trying to position CEA as a counterpoint to what they call "traditional business intelligence and data warehousing approaches," touting their ability to deliver "enterprise-wide investigative insight into customer experience and behavior." If you're looking for a one-sentence differentiation, well, First Coffee supposes that's as good as any.

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

Unsubscribe and Permission

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

Seth Godin wrote "Permission Marketing" in 1999. Ten years later, most media companies don't understand the concept still. As Seth explains in the book and in his blog numerous times, when I give you my e-mail address, it is a trust issue. I trust that you will not spam me; inundate me with off-topic e-mail; and most importantly not sell my e-mail address to third parties, even if they are your partners.

All too often, when I sign up for an event, I get inundated with e-mail from the vendors of the event. This irks me for a number of reasons, but mostly because I did not give my e-mail address to them.

This is a failure on so many levels. The media company has a database of e-mail addresses that are mostly "junk." By that I mean Yahoo, Hotmail and the like. That means they are likely not sending email that will not be read.

An advertiser is paying to send an e-mail that will be likely read. It does no good to pay for 5,000 e-mails if 4,500 of them are worthless, unopened, bounced or sitting in an e-mail box that gets opened infrequently.

By the way, the CAN-SPAM Act is one thing, but your media company brand gets destroyed by these kinds of hijinks. Act accordingly.

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

ADTRAN Acquires Objectworld

In his Communications and Technology Blog, Rich Tehrani writes:

I got a tip that ADTRAN was acquiring Objectworld. My take? Objectworld is a company with great UC technology and no brand recognition. ADTRAN is a company with a product line similar to Cisco but much smaller. Still, with a market cap of over $1.4 billion, Objectworld can really get a boost from ADTRAN's access to capital, infrastructure, reseller network, carrier relationships and improved branding.

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

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by Brendan Read

Managing Workforce Performance

OUTSTAN
Excellent
Very Good
Average
Below Averag

If there is one central objective of contact center management it is achieving optimal performance from the agents. This can be measured by yardsticks such as increased customer retention, loyalty, issues resolved, sales and collections and/or reduced costs.

To reach that goal requires obtaining, analyzing and then utilizing that data to drive performance. That is the essence of integrating performance management (PM) with contact center workforce optimization (WFO) solutions (PM/WFO) accomplished via tapping information from many sources including ACDs and CRM systems, speech and screen analytics and surveys. With PM/WFO supervisors can see what is happening in real time, find out why and coach and train agents to boost results.

Jim Davies, research director, Gartner, uses the example of Fred, a contact center agent who has a cross-sell ratio of 1 in 20 calls, but his center's target is one in 10. If Fred's center didn't have a PM system his supervisor might not know there is a problem because that data has been recorded on the CRM but not linked to the contact center. He might spot it if he had luckily picked a call of Fred's to monitor; most calls selected tend to be random.

"With PM you're constantly capturing that data," says Davies. "If Fred's center has PM integrated with the CRM and WFO the tool would automatically alert Fred and his supervisors. It can then schedule a coaching session or e-learning based on Fred's availability and track his subsequent sales performance. Performance improves because Fred has had that training course and learned to be a better-cross seller."

More firms are, not surprisingly, turning to PM-enabled WFO. Ryan Hollenbeck, senior vice president of marketing, Verint cites the interest to organizations' needs to get their arms wrapped around their customers to retain them.

"Even in the most challenging economic environment, if you completely neglect your customers and you don't focus on their experience, and only on cost cutting what we've found is that most of our customers say it severely impacted customer retention," says Hollenbeck. "They end up in a situation where they're seeing a lot of customers defecting and they've figured out that they can't afford that."

In turn, these needs are prompting suppliers to devise more innovative solutions. Interactive Intelligence is enhancing its workforce management (WFM) software, Interaction Optimizer by adding agent scheduling preferences with ranking criteria. This will enable supervisors to use performance criteria to determine schedules and incent agents to boost their effectiveness so they can get their desired shifts.

Adjusting Metrics to Meet Corporate Goals

For performance management methods and by extension contact centers to be truly effective the right metrics must be used: those that align the centers' goals with those of senior management.

Allyson Boudousquie, director of business process management at Aspect, says developing successful customer service, collections or sales and telemarketing strategies therefore requires that managers truly understand their contact center metrics in the context of overall business and financial goals. These same managers must then determine what information will best help them identify whether or not the contact center is successfully contributing to corporate objectives.

Yet the metrics to attain corporate goals may not be the same ones that contact centers have traditionally used in the past to measure their performance, i.e. AHT. For example, an organization that wants to increase profitability by 20 percent, decrease operating costs by 10 percent, and improve customer retention rates by eight percent should translate these high-level objectives into operational metrics. They can include revenue per call, schedule compliance and service level scores

"The traditional goal of keeping costs down is still necessary in this economic environment, says Boudousquie, "but companies need to set new goals, put new practices in place, and invest in technology that takes them beyond traditional contact center management to a workforce optimization process that aligns operational performance with corporate strategy."

"The relationship between WFO and PM is becoming increasingly important as contact center leaders are urged to improve agent performance feedback and more effectively evaluate its impact on the contact center overall," says Troy Plott, product manager, Interactive Intelligence. "This urging is due in part to the increased scrutiny of staff expenses and the current economic climate. PM is a critical tool to ensure maximum efficiency and effectiveness."

Beyond The Dashboard

To help contact centers delve quicker and deeper into performance and productivity issues PM/WFO tools are going beyond just pulling out and posting information on dashboards. More solutions now have data mining that enables managers to spot trend seams that point to larger issues, utilizing analytics tools to permit them to find root causes so they can correct deficiencies or maximize opportunities. They integrate structured information such as from ACDs and CRM systems with unstructured raw data obtained such as from recordings and screen captures and make sense of them in meaningful ways.

Gartner's Davies uses this comparison. A standard dashboard would say "average wait time was 23 seconds last week." With data mining it would report that "wait time was 23 seconds because these five agents were out sick last week unexpectedly."

"With advanced analytics and data mining you're no longer saying 'here's the data,' you're actually beginning to say 'this is what the data is now telling us," says Davies. "Data mining gives more power to contact center managers so they can get to grips with what is going on and help them make decisions."

Verint has written in new integrated dashboards in its Impact 360 WFO solution that enable contact centers to aggregate information from different Impact 360 functions, reports and third-party sources. Verint's product features patented data mining technology that can analyze many metrics including average handle time (AHT), percent talk time per day, evaluation scores and first contact resolution (FCR). The new integration feature, explains Hollenbeck, "helps solve the problem of accessing disparate information throughout the enterprise by serving as a central repository for information."

Making tapping into unstructured data from voice recordings more feasible are new, less expensive, yet value-rich speech analytics tools. For example Envision Telephony's Envision InteractionIQ analytics solution focuses processing power on the most pertinent and relevant interactions. It also sets up saved searches to have only filtered recordings including specific voice data delivered to an inbox to expedite review. Envision has linked InteractionIQ with its new Envision WFM solution that contains user-friendly drag and drop schedule interfaces, powerful what-if analysis capabilities and customizable menus for each role.

More data analytics-rich solutions are on their way. dvsAnalytics plans to add to its Encore WFO product desktop analytics through a partnership with Iontas, speech analytics via CallMiner and a multi-tiered data access design to enable Encore to work with any recording solution.

The Best Laid Plans...

"The best laid schemes of mice and men/go often askew" – Robbie Burns (translated into standard English by Wikipedia)

Contact center managers live those words. No matter how carefully they plan there is almost always some event such as a viral infection, traffic jam, sudden call spikes such as from a hot product, or a workforce calculation error that can wreak havoc on staffing hence on service levels.

The ability to respond to those situations is what Dr. Turgut Aykin, president of ac2 Solutions, calls "performance optimization" or PO. His company, which makes the artificial intelligence-based Advanced Workforce Optimization (AWO) WFO solutions, has a tool, the AWO Performance Optimizer. It enables PO by monitoring, tracking and reporting the contact traffic, performance and agents' adherence to their schedules.

The ac2 Solutions president uses the analogy of launching a rocket. Planning involves setting the target trajectory and, once it is in flight, then making midcourse corrections to adjust the trajectory for deviations from plan and new conditions, and monitoring and learning from the earlier launches to ensure that it reaches the target. WFO is the planning and PO is the midcourse correction.

The information gathered by PO minute by minute enables managers to adjust schedules by rescheduling breaks, training periods, shortening wrap up times and consolidating routing queues. If the gap between service levels and agent availability are wide and long managers can ask staff to cancel meetings or training, call for reserve staff, work overtime, route calls to other centers or divert calls to outsourcers.

"There are two dimensions to performance: the first is the forecasting and planning, predicting customers' needs and inquiries so you can deploy your resources properly and the second is how well you can monitor and respond to what is or will happen and the action you take once a day begins," says Dr. Aykin. "For how well you respond and adapt determine the performance achieved."

Performance Tips to Weather the Economic Storm

Monet Software, which makes workforce management solutions points out that in these challenging economic times, every call and every dollar count. In response it has published a white paper available for download with 10 tips aimed at boosting efficiency, service levels, customer base and revenues and ultimately performance. Here they are, in summary:

1. Implement a flexible shift model

A flexible – as opposed to a fixed shift – model can more precisely match staffing with demand. This change, implemented gradually so that the staff can get used to it, can increase service levels by one to two percent, and result in a similar percentage of personnel costs savings

2. Keep track of shrinkage

Many companies underestimate the sheer volume of shrinkage (i.e. paid time but not available for calls.) It can be reduced by employing a flexible shift model, increasing forecast and schedule accuracy and by monitoring and improving schedule adherence.

3. Improve schedule adherence

Schedule adherence can be improved by educating agents on its importance by measuring and tracking adherence using WFM solutions and by rewarding agents for following it.

4. Cross-train agents

Training agents to handle multiple skills and use skill-based routing can reduce the number of agents needed. The productivity gain from giving each agent two skills alone can easily be 10 percent to 15 percent.

5. Compare ACD logon time to time-clock entries

Make sure agents are logged in and ready for calls coordinating with the clock time. Consider using the ACD agent log-in and log-out times for payroll.

6. Smarter scheduling

Consider scheduling all agent activities including breaks, multiple skills of agents, training, time-off, and a realistic buffer for shrinkage. Create schedules by agent rank to reduce costs and increase sales and teams made with agents with matching personalities to boost performance.

7. Keep top talent on your team

Accommodate scheduling needs and provide schedule visibility to team members to keep them loyal and productive.

8. “Check out” your spreadsheets

Spreadsheets are inefficient and inflexible. Switch to WFM solutions instead.

9. Think big for small or medium size centers

It may be ironic, but smaller or medium-size contact centers are more difficult to manage because every agent and every call has more effect on the overall performance. See where improvements are needed and use appropriate tools or software solutions in response.

10. On-demand solutions reduce cost and risk

On demand or software-as-a-service WFM solutions can increase operational efficiency without the capital investment, IT resources and long and painful implementation times.

(To download this paper, go to http://www.monetsoftware.com/Why-Monet/Success-Kits-and-White-Papers/Signup/)

Enabling Multichannel Performance

New PM/WFO solutions are being rolled out to enable contact centers improve performance across other channels including chat and e-mail/SMS, social media, and IVR and web self-service. Calabrio will release the Calabrio One Web 2.0 framework for its WFO solution this year. It will feature software widgets that will permit managers to track, analyze and optimize agent performance when handling new channels as they emerge.

“We do believe that more channels will take hold, as e-mail has, “explains Kristen Jacobsen, director of marketing communications, Calabrio. “Our Web 2.0 framework will enable us to help customers optimize those services delivered via other types of communications.”

NICE recently added multi-channel analytics to the NICE SmartCenter Interaction Analytics solution. It can automatically correlate a customer e-mail requesting a product upgrade with product feedback communicated via social media. It can then ensure that when the same customer calls the contact center an agent they talk to automatically knows about those recent activities. The insights gleaned in this example can help identify say a potential up-sell opportunity.

“You need that analytical capability to look at your interactions with your customers and understand their overall experience across all touchpoints and find ways to enhance it,” says Oren Ezra, vice president of solutions marketing, NICE. CIS

The following companies participated in the preparation of this article:

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www.aspect.com

Calabrio
www.calabrio.com

dvsAnalytics
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NICE
www.nice.com

Verint
www.verint.com

by Brendan Read

Smooth Sailing With Aspect's PerformanceEdge

Contact centers are central to the travel and hospitality industry, handling reservations and sales, questions and managing any issues that arise. How effectively and efficiently they perform is therefore vital to these businesses.

International Cruise & Excursions, Inc. (ICE) is a cruise and vacation club affiliated with the world's leading cruise lines, 650 luxury resorts and international tour and travel providers. ICE operates three contact centers with a combined 550 agent positions in Phoenix, Ariz. and San Diego, Calif.

To schedule contact center staff ICE had been using Excel spreadsheets. Yet its managers found this process inefficient and difficult to use. Insights into key performance metrics like average handle time, shrinkage and real-time adherence were nonexistent.

ICE's leadership learned that it needed a robust workforce management tool, as well as a solid performance optimization strategy, to achieve higher closing percentages, better sales margins and more efficient operations. In late 2006 it decided to implement a workforce management (WFM) solution blended with a performance management enhancement package that would provide coaching forms, dashboards and out-of-the-box key performance indicators (KPIs) measuring agent and team performance.

ICE chose Aspect's PerformanceEdge solutions: Aspect eWorkforce Management with the Analyze II enhancement package, a pre-packaged performance management feature that provides a coaching form, dashboards and out-of-the-box KPIs. It selected Aspect Performance Edge for its unlimited what-if scenarios capabilities, for its sound forecasting mechanism and user-friendly navigation.

"We sold our senior management on the new investment and Aspect PerformanceEdge's solution by presenting to them a crash course on 'Workforce Management 101' and demonstrating how it could save us approximately one million dollars a year," recounts Adelina Petrov, director of sales and operations analysis. "I detailed how measuring and improving KPIs would translate into large cost savings as well as increased revenue generating potential without the need to hire and train new agents."

ICE installed Aspect eWorkforce Management/Analyze II in fall 2007. ICE and Aspect developed a customized system of dashboards and reports for KPI tracking and goal setting. In 2008 ICE added a performance optimization module.

Petrov took the lead in managing the entire project from start to finish. She educated her team about what the numbers mean, and how to best address the multitude of scenarios that crop up in the contact center on a daily basis. She would sometimes allow an employee make the wrong decision and learn from it instead of working with a person who requires a supervisor's sign off on every task.

"A contact center cannot rely on one individual or center of knowledge. Responsibility needs to be distributed and owned by the team in order for the operation to function successfully," says Petrov. "I work to ensure that every member of our workforce management team is confident and capable to call the shots when they need to."

Petrov's estimate of what the workforce management/performance management strategy could achieve was way off the mark, in a good way. Improved productivity arising from hikes in schedule adherence to 93 percent from the 78 percent it was tracking prior to it materialized in approximately $2.5 million dollars per year cost savings. ICE's initial investment repaid itself within just four months post implementation while sales revenue improved by 22 percent in 2007 compared to the previous year. In addition, the software saved 6,500 hours of frontline management time per year, translated into not employing four full time equivalent supervisors.

The increased efficiencies gained with PerformanceEdge enabled ICE to survive the economic downturn that rocked the travel and hospitality industry. In late 2008, the company made the conscious decision to operate an under-staffed contact center during 2009 to survive the economic uncertainties.

"We were able to meet all of our service levels but this required a much higher level of analytical effort on the workforce management front," says Petrov. "PerformanceEdge made it possible for us. We ran more efficient schedules, more robust forecasting, and intraday performance with the help of PerformanceEdge." CIS

by Brendan Read

Looking Into 2010

If there are silver linings in the downturn, they are that firms of all sizes are finally beginning to realize that retaining customers through quality service rather than continually prospecting and mining for new ones is one of two keys to prosperity. It is much less expensive to keep customers loyal than to replace the ones lost through churn, a key cause of which is buyer dissatisfaction. The other key that companies are beginning to grasp is that they need to literally think of the box to bolster their productivity.

What is emerging for 2010 and into the next decade is a contact center sector that is doing more with less. Live agents are being targeted on complex problems, more challenging sales including cross-selling/upselling, and collections. Social media is quickly rising in importance alongside voice, e-mail/SMS and chat as a channel while expanding 3G and 4G/LTE wireless networks are enabling more interactions from anywhere.

At the same time, basic customer service, support, order taking and notifications tasks are being increasingly shouldered by automated inbound and outbound voice and text and Web self-service. Interactions are being analyzed to eliminate repeated and escalated calls and contacts, uncover and address service matters and sales opportunities, and improve self-service.

Contact centers themselves are becoming re-invented: less confined to a specific department or building or even individuals. More employees are becoming involved (i.e. as “informal agents” to assist customers because they are available and/or because their expertise is needed.) The staff can be on the floor, on the road, in a bank branch, or at a front desk, clinic, store and at their homes. More of the contact center work is being handled domestically; instances of poor cultural affinity between nearshore and offshore agents and Americans (and Canadians) has led to customer satisfaction issues that threaten to override the cost savings via other nations’ cheaper labor.

The net results are productivity gains and cost savings amounting to thousands of dollars per year/per person: $10,000/year-plus for at-home agents alone reports the Telework Coalition, plus additional revenues including collections. This translates to fewer agents and formal contact centers as the economy picks up this go-round as compared to the boom that had been experienced in previous downturn bouncebacks.

Elizabeth Herrell, vice president of Forrester Research, reports that companies plan to continue their investments in their current operations but do not plan major growth in facilities. “As the economy recovers, moderate growth in new agent positions is forecasted,” she says.

Going Virtual: Automated and Hosted

Enabling the doing more with less are increasingly powerful, center-and-customer-friendly automated customer care via IVR/speech recognition and Web self-service and outbound notification tools. Adjoining them are knowledge management solutions that pull answers from not only the knowledgebases but also from the Web including social media sites.

Joe Outlaw, principal analyst at Frost and Sullivan, sees speech recognition gaining share at the expense of less expensive (if often but not always less user-friendly-ed.) DTMF-based IVR through steady improvements in recognition rates, language domains, and application programming tools and techniques and cost declines.

“The more natural and easier-to-use advantages of speech result in higher acceptance and usage rates than for similar DTMF-interfaced applications,” says Outlaw. “The higher rates deliver business values in terms of lower costs to process customer contacts and increased customer loyalty.”

Colleague Keith Dawson, principal analyst, Frost and Sullivan, adds that there is going to be a lot more interest in proactive outbound contact to customers via both voice and text messaging.

“This is partly due to call deflection and cost, but there’s also a serious move to try to build customer loyalty through helpful alerts that grab the customer’s trust before using the channel to try to make a sales offer,” says Dawson.

CRM, Social Media and Channel Integration

There is a growing need to integrate multiple customer interaction channels to track and manage end-to-end customer experiences. That includes opportunities to tap into social media and to fully utilize wireless networks to enable more productive interactions with field sales staff.

These needs are being met by customer interaction management products that connect into multiple channels and support a wide range of CRM applications. There are new and under-development CRM applications that tap into and permit interactions over social media; CRM solutions are being re-oriented to enhance the customer experience. There are analytics and intelligence applications that parse customer data and present streamlined, targeted replies and offers to mobile sales team members.

Optimizing Performance, Staff With Analytics, WFO

There is an integration of new, powerful analytics, performance management and workforce optimization (WFO) solutions coupled with data, speech and screen analytics that enable contact center managers to see what is happening, figuring out why and acting accordingly. Data from every touchpoint: ACD, CRM, and voice and screen recordings are being captured and root cause analysis is carried out on this information to see where agent performance and customer satisfaction can be improved. Coaching and training can then be scheduled and results tracked.

To benefit from them managers to fully understand what these tools can do for their organizations. That means these tools' suppliers must show to these prospects how they can deliver strong ROI. This is now happening in speech analytics, which has picked up some traction in recent months, says Frost and Sullivan and looks to be a bigger factor in 2010.

"Many suppliers, for the first time backed up their contentions with real case studies," says Dawson. "This helps contact centers see the value in these tools as they relate to their circumstances."

UC Benefits and Challenges

One newish set of solutions that are beginning to bolster contact center performance and productivity is unified communications. UC blends via IP all communications channels through a single interface.

The primary benefit of UC is that it can speed up the handling of business issues, explains DMG Consulting in a new report, "Contact Center Unified Communications Market, Vendor and Product Guide." As it says vendors phrase it, UC has the potential to greatly reduce the "latency" inherent in traditional business processes. So, for example, instead of leaving a phone message and playing phone tag, employees can look up their colleagues' presence status and, if they are available, reach out to them via instant messaging. This can sharply reduce or eliminate delays in solving business issues. UC can also turn other parts of the organization into contact centers (i.e. enabling informal agents.)

The practical problem is that managers of other departments do not want their employees interrupted throughout the day to handle customer inquiries, explains the DMG report. It says UC implementations have to be carefully thought out though with buy-in from every department.

E-Learning and E-Screening

Fundamental to this customer-focus shift is coaching and training agents to gain optimum results. To accomplish this there are increasingly capable e-learning tools that teach agents when they are available without the costs and productivity losses of taking them away from seats to be taught by instructors. When instruction is required such as for new skills and products, advanced Web and videoconferencing tools including to agents' desktops are beginning to supplant face-to-face sessions. These solutions cut travel costs for trainers and participants.

Quality and productivity begins with the hiring the right staff. There are e-screening solutions that rapidly and economically shift through the large volumes of applicants to find the ones best suited for the positions.

> **"As the economy recovers, moderate growth in new agent positions is forecasted. Premises-based solutions still dominate but there is growing interest in hosted solutions."**
> – Elizabeth Herrell, vice president, Forrester Research

"Screening and recruitment services has the definite possibility of strong growth, starting from a relatively modest base, as companies try to get a better handle on how they allocate scarce resources to the very expensive hiring process," says Frost and Sullivan's Dawson.

Going to the Cloud?

One increasing viable and popular option for buying solutions is cloud delivery either on-demand from suppliers or hosted by third parties. These solutions shrink hardware and software footprints and onsite support costs, provide greater flexibility to meet changing demands and enhance business continuity.

"Premises-based solutions still dominate but there is growing interest in hosted solutions," says Forrester's Herrell. "Cloud services are especially appealing to companies that want to expand or contract with their business and not require them to overprovision for potential traffic spikes."

The BPO Option

Business process outsourcing (BPO) has long been the alternative to operating internal contact centers. Their principal benefits are increased flexibility, capital investment avoidance, providing best practices customer care and sales and business continuity.

More of the benefits are being delivered at-home, observes Michael DeSalles, strategic analyst, Frost and Sullivan. Companies are asking providers about the viability of this agent solution and potential home agent candidates stream onto websites by the thousands each week to apply.

"Home agent providers have already done the 'heavy lifting' by building the essential building blocks for the model: the technology platform, the recruiting and agent screening processes, virtual training/certifications, workforce management applications and compensation programs," explains DeSalles. "They can get access to the right talent matched to a company's specific product or service." **CIS**

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By Tim Searcy, *CEO, American Teleservices Association*

2010 Legislative Expectations?

More of the Same for the Contact Center Industry

The standard cast of legislative "characters" remains active at both the state and federal levels of lawmaking. Granted, with state houses adjourning for the year, many of their bill drafts died along with the end of the session. This is a common event. If bills do not get voted into law or officially "carried over" into the next session, it is death by adjournment. This does not, however, prevent the same issues from arising in the next state legislative session, and we have seen this exact "rise from the ashes" occur time and time again. Of course the policy issues we care about are subject to change as legislators and regulators continue to determine the direct marketing rules and regulations that permit our industry to communicate with its customers. Here are two topics that should be on your radar for this year:

Business-to-Business DNC Registries

We have watched a number of states propose legislation that would permit businesses to register themselves on the existing Do Not Call (DNC) state registries. The subtext of such rule making is fundamentally flawed. Consider the fact that our economy is in dire straits, and being a free market economy, it will be direct commerce that will pull us out of the doldrums. If businesses are allowed to remove themselves from the channels of commerce, then business trade will be severely hampered.

The American Teleservices Association (ATA) has managed to kill these bills in some states, however, states like Pennsylvania (PA Senate Bill 423), Tennessee (TN Senate Bill 1232) and Oklahoma (OK House Bill 2050) continue down the path of allowing businesases to register for their state DNC list. Using not so clever language, these state bills offer to allow businesses to refer to themselves as "consumers." This definition lets them join under the prior DNC scheme.

So let's say that one of these bills becomes law, or another state reintroduces the concept and fast tracks it to enforcement. What is the trade off? If a business can exempt itself from the chain of commerce, should it then be restricted from outbound sales efforts? Can you imagine: our company enjoys a quiet day of no sales calls from outside vendors, yet busily has our sales reps calling every business in our sector trying to drum up new accounts?

Additionally, who is ultimately responsible for listing the business on the DNC? Well, for current consumers, it is the "owner" of the telephone number. Therefore, it would be required that the owner of a business be the sole decision maker for business DNC registration. Under this legislative scenario, the decision could be made by anyone in the firm, with or without proper authority.

> IT MAKES MORE SENSE TO CREATE A NATIONAL STANDARD FOR WHAT CONSTITUTES A REASONABLE "BUSINESS RELATIONSHIP" PERMITTING US TO RETURN CALLS WITHOUT FEAR OF COMPLYING WITH THE MYRIAD OF DIFFERENT STATE RULES PERMITTING US TO RETURN A CALL OR NOT.

Text Messaging and Cellular

Often coupled with fax solicitation restriction bills, cellular DNC or DNC without an existing business relationship (when we're lucky enough to have it defined) gets in the way of the consumer who readily provides this number in all sorts of scenarios. From a regulatory perspective, it is illegal to contact cellular phones using a predictive dialer without prior written consent. This illuminates how difficult it is to establish consent with our customers for on-going communication on cell phones or landlines. It makes more sense to create a national standard for what constitutes a reasonable "business relationship" permitting us to return calls without fear of complying with the myriad of different state rules permitting us to return a call or not. Veiled in many bills as "consent," the reality is that if a consumer provides us a number, we should be able to return the call. That seems a base logic for permission to call regardless of cellular or not.

Texting is a whole different subject. Movement is underway to strictly prohibit unauthorized texting to cell phones. This will also pose a serious express written consent opportunity which marketers will have to continue to create opportunities in bill language to preserve.

Legislators often believe that anything worth doing is worth overdoing. For this reason, we see a lot of redundancy even within an individual state's bills. For instance, in the New York Assembly, there are currently four bills covering virtually the same DNFax area. NY Assembly Bills 941, 3251, 3614 and 4157 are nearly identical in intent, all trying to accomplish the same thing simultaneously. None passed during this past legislative session, yet all are carried over into 2010.

It is impossible to say what the federal efforts will be in 2010. With two active wars, healthcare, budget concerns, the economy, and an appetite for greater tax revenues, our issues may be secondary. We can only hope to be so lucky. If we did not have a federal fight in addition to the state issues enumerated above, the ATA could focus its efforts on the its Self-Regulatory Organization (ATA-SRO) adoption and on securing a response from the Federal Communications Commission to our petition for exclusive federal jurisdiction. In the meantime, please watch this column for regulatory and legislative updates, and I can always be reached at tim@ataconnect.org.

Until next time, I am on the line. CIS

Tim Searcy has worked in the direct marketing industry for over 30 years and currently serves as CEO of the American Teleservices Association. He has worked throughout the U.S., Europe, Asia, Latin America and the Caribbean to boost growth, strengthen regulatory compliance and lead the establishment of best practices throughout the teleservices industry. He testifies and lobbies in Washington, D.C., on behalf of small businesses and Fortune 500 companies to preserve the balance of business operations and industry-wide regulation. He is also a published author on CEO leadership, sales and marketing.

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2010 CIS Product of the Year Awards

In the first issue of each new year, CIS dedicates a section to the vendors that have shown a dedication to delivering products and solutions that enable businesses to be more attentive to their customers and provide higher levels of customer service than ever before. This year's CIS Product of the Year winners are no exception, and represent an ever increasing range of products that help their users deliver an enhanced customer experience.

Winning products range from complete contact center platforms to workforce optimization software to headsets that improve agent voice quality to CRM systems to field support team solutions, and much more. Many are designed for nearly any customer-facing environment, while others focus on particular market segments, such as field support services. The common trait that binds them, however, is their ability to provide users an opportunity to be more effective and more efficient in their customer-centric activities, in turn, helping their businesses grow in a uniquely competitive business climate.

The editorial staff of CIS congratulates this year's winners and looks forward to another year of exciting and innovating products that will drive customer satisfaction through communication. CIS

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Advanced Workforce Optimization Portal

Acqueon Technologies Inc.
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Allegiance, Inc.
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Mitel Contact Center Solutions Release 5.6

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Brendan B. Read, *Senior Contributing Editor*

Want to Make Money? Shape Up Your Voice Self-Service

Here is a tip for contact center executives to make money and not leave it on the table in these challenging economic times: clean up your voice (i.e. IVR self-service) and quit treating it as steerage for those stereotyped 80 percent of customers who generate the 20 percent of revenues who don't qualify to "speak promptly with a live agent."

A new report from Genesys Telecommunications Laboratories, "The Cost of Poor Customer Service" spells the issue out. It estimates that lousy treatment of those who put money in the hands of businesses ding the U.S. economy to the tune of $83 billion. Where is this coming from? Some 71 percent of consumers that have ended a relationship due to a poor customer service experience.

What is the impact to enterprises? How about an average value of $289 in one year of each customer relationship lost to a competitor or abandoned? Add those up and we're talking serious money.

So why do customers leave? The Genesys report points to having them repeat themselves, being trapped in automated self-service, forced to wait too long for service, contact centers that don't their history and value and an inability to switch channels easily.

Which is the most problematic channel? IVR, what else? 33 percent of respondents cited it as the most challenging mode. Moreover 38 percent said "it is critical to improve voice self-service to make it more intelligently integrated with human assisted service."

One reason is the nightmares of busy consumers trying to get out of automated Hades to reach live agents. The Genesys report revealed that spent more than 9.5 minutes trying to reach a person.

"As a result, even paper mail is preferred to poorly implemented voice self-service," says the paper. "Consumers say the biggest issues are that voice self-service does not recognize the value of the consumer, lacks context, and needs to recognize customer needs and intent better. Another consumer said: 'I don't mind automated systems but...I hate it when I am unable to reach a human, and the automated voice continues to make me repeat over and over, and when I finally get close to being connected to a human, I am disconnected and have to start over again.'"

In contrast while not surprisingly most people are happy with live agents, more were satisfied with Web self-service than not. Conclusion? It isn't the self-service per se that bugs buyers but the implementation on the voice side.

So what gives? This isn't the first time commentators like me have beaten contact centers over the head on IVR. I've lost track of how many analysts and other reports that have said the same thing in the 14 years I've been covering and involved with this industry.

Why can't centers make IVR as pleasing or, at best, not as offensive as the Web? Why do they insist on blowing opportunities to save large sums over live agents in handling simple calls by ticking off and driving away your customers when these supposedly valued buyers/prospects use your voice systems?

The solutions are there and there's no excuse not to adopt them. They include trimming the menu trees and making it easy for customers to zero out: throwing obstacles in their way is only going to make them consider tossing your business into the recycle bin.

The tools also include going to user-friendly speech rec for the right applications. These solutions are becoming less expensive, easier to implement and more customizable. Microsoft has an increasingly sophisticated and affordable array of premise-installed and hosted (via its Tellme subsidiary) speech products. Nuance's latest offering, Vocalizer 5 manages the static and carrier prompts and computer-generated speech through one unified interface to deliver a seamless flow of speech, free from clicks and latencies that can hinder the user experience.

So what are you waiting for? Your competitors to take the money off your table?

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