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Salesforce.com's Chatter On Social CRM

Alex Dayon, Senior Vice President,
Customer Service and Support Applications, Salesforce.com

Also In This Issue:

- Enterprise Feedback Management
- Announcing The SocialCRM Expo! (See page 9)
- IP Contact Center Pioneer Awards

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Rich Tehrani, *CEO, TMC*

The Three Little Bears and Social Media

Recently, a TMC team member returned from a show in the call center space and reported that some companies at that event didn't think social media and the call center were going to intersect. When I heard this, I couldn't help but remember the mid-nineties, when TMC launched a conference that tied the call center to the Internet. A few of our top customers told us we were jumping on the Internet "fad" and this had nothing to do with their business. A few years later, the Internet took off, and the complaints went away.

A few analysts also beat us up pretty badly – no one wants IP in the contact center, we were told. Sure enough, a few years later, you couldn't discuss contact center infrastructure without discussing IP.

Change is constant in the tech space – and the challenge decision makers are faced with is not only determining trends but figuring out when to act on them. If you are too early or too late, you risk your job.

Personally, I believe that if your contact center infrastructure vendor doesn't take the merging of social media seriously, you shouldn't buy from them anymore. The reasons for my strong feelings are detailed in past columns and can be summed up in two words: customer empowerment. And they are empowered – anyone can comment about any company – whether they are a customer, competitor or disgruntled worker.

In past years, it was difficult for information on social networks to be found, but today, the world seems to have decided Facebook and Twitter are the most popular places to network with others, and search engines have gotten fantastic at ferreting out social media information and merging it with other results. Google recently went public with its Caffeine upgrade which blends social media results and if you do a search on a popular topic like "BP" you can potentially see what I mean – depending on if Google happens to be showing social results at that particular moment.

Did you know that if Facebook were a country, it would be the third largest – surpassing the U.S. and only behind China and India. And did you know that Comcast sees between 5,000 and 8,000 mentions of its name per week and successfully resolves hundreds of customer support issues by using Twitter.

These nuggets and many more can be found in Social Media and the Contact Center for Dummies, by Avaya's Paul Dunay, one of the top minds in the world of social media marketing. The book is required reading for everyone in marketing who is not a social media expert. It should take no more than an hour to read and includes a bunch of free tools, which alone make it perhaps one of the most useful on your shelf.

Social media is not only a defensive tool, allowing you to listen and react to what customers are saying, but it affords companies a way to interact with customers in the places where they live. Many of your customers are somewhat addicted to Facebook, Twitter and YouTube and they will be more susceptible to your message if they find it in context.

"Ignoring the social context in which customers operate is a recipe for failure. However, to really connect to their customers' social context and to make the most out of their investment in social marketing, companies must look beyond social media and examine how they can leverage social influence on a broader scale," explained Ran Shaul, Pursway co-founder. "The good news for these companies is that the key to unlocking the potential of social influence is in the customer transaction data they already have. But to gain the insight into the social connections and social behavior of influencers and followers, they need to analyze this data in a completely different way than they do to today."

That said, we are only in the early stages of the business social media revolution, and as Shaul notes, there is much work and innovation to come.

Businesses "are interested in social behavior that translates to business metrics, such as revenues and churn, not tweets and blog posts," he says. "There is very little data that allows [them] to connect the dots between these metrics and what you can see in a social media sites and do it in a scalable and cost-effective manner."

Just like other forms of communications such as e-mail, social media will not become a wholesale replacement for the other ways your company does business, but it does need to be integrated into your business in a cohesive way. This means you shouldn't put your social media strategy on an island, but instead integrate it rapidly with the contact center, marketing, PR, SEO, community-building and other initiatives.

With the insane growth of social media this year alone, it is safe to say Goldilocks would be thrilled to be in this situation as it is definitely not too early or too late to jump into the mix – the timing is just right. CIS

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Erik Linask, *Group Editorial Director, TMC*

Automation vs. Personalization

There's been so much talk about process automation lately, thanks, in no small part, to the integration made possible by IP-based communications. Without question, being able to automate many customer service processes can increase operational efficiency and maximize employee productivity.

Capabilities like activity and process routing, auto-generated reminders, interaction automation, and IVR, often give customers the satisfaction of having issues resolved very quickly and simply. For instance, customers often forget what day or time a service tech is scheduled to show up, or for what time their furniture delivery is scheduled. These are reasonably simple automated systems to set up, and are a very effective means of ensuring both customer satisfaction and business efficiency. In fact, entire workflows can be automated to ensure processes are followed, but that they happen in a timely manner, even to the point of accounting for staff out on holiday or otherwise unavailable to quickly address customer concerns.

Of course, many businesses find out the hard way how they could benefit from automation, such as the flooring company I recently hired to refinish my hardwood floors. Despite having made the appointment several months in advance to accommodate travel and vacation schedules, and despite having received not one, but two confirmation messages the Friday prior to my Monday appointment, the crew never showed up. Why? Because the process fell apart when the office manager, who pulls the next week's schedules manually from a master grid and sends them to each crew, failed to recognize that a crew head who suddenly became unavailable had jobs scheduled under his name and did not pull those records.

It's not hard to figure out how an automated internal notification process would have eliminated the mishap – and not left a permanent reminder of it in my mind, despite ultimately being very pleased with the finished product.

But, a word of caution: automation is not a substitute to personalized service.

In another case, I had to return a mattress with which I was dissatisfied, and was immediately asked when I would like to schedule an exchange. When I requested a credit in lieu of an outright exchange, that request was also quickly accommodated, though I wasn't convinced the process would be quite that easy – it never seems to be.

Much to my surprise, I received a call later that evening from an in-store rep from the local branch letting me know he had pulled our paperwork and we could come into the store at any time to pick out a new mattress, either receiving a refund for or paying the difference, depending on our new choice.

Now, I will fully admit that the exchange process may have gone off without a hitch, even without the extra phone call, but I can say, without a shadow of a doubt, that phone call significantly increased my satisfaction with the store, despite having woken up for many weeks with back pain.

The point is simple, there are many products available that enable process automation today, from companies like Interactive Intelligence, Zeacom, Adobe, and others, and most are highly effective in streamlining processes, ensuring customer requests do not fall through the cracks and allowing staff to focus on customer needs instead of the processes. But, the successful business will recognize how to effectively leverage automation and the added attention it allows reps to give customers, adding an increased degree of personalization that, quite simply, makes the customer feel important. In fact, this holds equally for external customer-facing representatives and for internal support groups, such as IT teams.

We all recognize the best advertising comes from existing customers – and the worst as well – a fact underscored by the growth of social media, through which your customers' comments and opinions can reach millions of other customers (both existing and potential) in seconds. This only makes it more imperative that, as you continue to improve your business processes through automation, you don't lose sight of the value of personalized, human interaction. You never know which interaction is going to leave the longest lasting impression on your customers, and many may well appreciate the ease of resolution automation can bring but, it's a safe assumption that most customers won't be upset about a little extra TLC to make sure their needs are being addressed. In fact, they may be pleasantly enough surprised to post about it to their social media accounts.

On a related note, to learn more about the impact of social media on your business, and how to effectively leverage the popularity of sites like Twitter, Facebook, LinkedIn, and others, register now for the Social CRM Expo (www.scrmexpo.com), taking place in Los Angeles, California, October 4-6.

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by Brendan Read

Salesforce.com's Chatter on Social CRM

Salesforce.com (www.salesforce.com) has become an iconic firm by taking underexploited methods, most significantly cloud computing, marrying them to existing solutions, in its case CRM applications and successfully developing them to meet present and future business needs. The firm is posed to repeat its success in the fast-growing social channel, expanding CRM into social CRM.

This year Salesforce.com is delivering Salesforce Chatter, a social enterprise collaboration solution. Chatter builds on Salesforce.com's existing social solutions, including Salesforce for Twitter, released in September 2009 with the launch of Service Cloud 2 and Salesforce for Facebook that came out in 2008.

Companies can bring Facebook and Twitter feeds and comment and tweet inside Service Cloud 2 within context of different groups, such as one team on customer service and another on business development. In addition, Chatter also has an API that tap into other web applications where there are conversations happening, such as Expedia and TripAdvisor so they can be brought into the Service Cloud 2 for engagement and response.

To find out Salesforce.com's take on the social channel and social CRM, Customer Interaction Solutions interviewed Alex Dayon, executive vice president of CRM, Salesforce.com.

CIS: Outline the key characteristics of the social channel, how it is similar and different from the other interaction channels

AD: When your customers encounter a problem with your product or service, what do you think they do? If you guessed that most of them search the Web for a resolution, you'd be right on. Whether it's an online search, a tweet or a post on a Facebook page, customers are seeking immediate answers, and they're seeking them in places where your response – or lack thereof – can be either a public success or a public spectacle. In many organizations today their traditional customer service channels are separate from their social channel, a neglected department that may have very little budget or no budget at all. But it doesn't need to be that way, and in fact it shouldn't be that way. Your customers today have embraced a world of social, collaborative and real-time information that is available across an ever-growing number of mobile devices. At Salesforce.com we call this new mobile, social, and collaborative paradigm "Cloud 2."

In the world of Cloud 2, the social channels distinguish themselves from all the rest because your customers' every interaction is instantly in the public sphere. The clock is ticking the moment that a customer posts about a legitimate issue using social media because that activity is transparent and the community can follow it until the issue is resolved. By fostering and rewarding vibrant communities, companies can help customers share expertise, solve problems faster and accelerate future product innovations.

Initially we've seen some companies try to ignore customer service issues that were brewing on social media. That's no longer an option and companies are starting to understand this. With high profile examples like Greenpeace's campaign on Facebook against Nestle, we saw Nestle respond swiftly and authentically. That "authenticity" is one of critical elements of a social media strategy for customer service: the truth will be heard.

CIS: How are customers using the social channel to engage with companies?

AD: Some of our large banking customers use our Salesforce for Twitter application to activate Twitter as a first-class channel for amazing customer service. Agents can instantly respond to customers' tweets, they have all the critical customer information available to resolve the customers' issues in real-time. We also see social media being used by our customers like Starbucks and Crocs Asia where these companies have developed rich vibrant communities that help customers resolve each other's issues and also let customers propose new ideas they'd

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like to see implemented. On the Dell customer community, customers can post questions and suggestions to Dell customer service and support and Facebook friends can see these interactions with the Dell community right within the customers' Facebook wall posts. The viral nature of customer service with social media means word travels fast, so if you're using a modern customer service solution, your customers should easily be able to find the best answers on any channel.

CIS: Is the social channel supplementing or supplanting the other channels and if so which ones and why?

AD: We believe modern customer service is going to mean that all of these channels will have to work seamlessly with your customer service processes. So for example, if a customer tweets a question about pairing their Bluetooth headset with their smart phone, a contact center agent can tweet a response directly with a link to a public knowledge article on a public website that Google search users can easily find too. We've had a huge response to our community and social media capabilities since we introduced them three years ago and companies like Dell, Starbucks and Crocs Asia are all examples of those communities thriving and improving customer satisfaction.

CIS: How are companies responding to the advent of the social channel in their CRM strategies such as social CRM? Has this forced them to alter their CRM methods and if so, how?

AD: For many customers today, their default approach when it comes to seeking customer service is an online search, which may or may not help them find the answers they – or you – want them to find. With Cloud 2, companies are realizing they can meet their customers where they already are. There's also no "hold music" on Twitter; customers are more in control of their own experience. So not only are companies connecting to their customers on these new channels, but they're also taking a serious look at how they collaborate internally to provide a cohesive, aligned experience that doesn't just satisfy the customer, it amazes them.

CIS: What are the challenges that have arisen with incorporating the social channel in customer interactions and with CRM? Some of the issues that have come up social include:

(a) Social media is media (i.e. contact center agents who respond on social sites are acting as PR representatives to a mass, often anonymous audience) and subject to the rules and practices of media – as opposed to one-to-one phone and chat/e-mail interactions.

AD: As you begin to embrace a channel like Twitter as part of your customer service strategy, think about the tone and style of how you communicate with your customers. It's important that contact center agents know the voice you want to use as a company, which is why it's essential to your success to educate agents on the boundaries of what can and cannot be discussed in a public forum due to the sensitivity or privacy of the matter. This is why it's also critical that your customer service solution can "thread" customer conversations across channels. For example, when a customer tweets a question from Twitter, an agent using Service Cloud can tweet back, and if customer privacy is required, the agent can open a case and continue the handling of the case over e-mail or phone.

(b) Integrating social media with the other traditional channels

AD: We see some companies who embark on a social media strategy for customer service by opening a Twitter account and responding to any tweet related to their company or products. The problem with this is that this social media approach is totally disconnected from their core customer service processes. It's critical that you can interact with the same customer on any channel the customer chooses, even related to the same case. So a customer issue that starts out as a question on Twitter, then transitions to a private e-mail exchange between an agent who resolves the customer issue by sending a knowledge article from the multi-channel knowledge base. Social media needs to blend with your existing customer processes.

CIS: Discuss the benefits and challenges of using social media as an internal collaborative tool amongst contact center agents and support reps

AD: Social media sites like Facebook have cracked the collaboration problem. We asked ourselves, "What if enterprise collaboration worked like Facebook, but was internal, private and trusted for business purposes?" That's why we've introduced Salesforce Chatter. In a contact center, agents can use their real-time Chatter feed to stay up to date on what matters to them. They can "follow" things like the latest accounts updates from sales reps, changes to knowledge articles and the top cases they're working on. The result: customers get better service, management gets visibility and agent efficiency goes through the roof.

CIS: What are the key emerging best practices and technologies for social media in both interactions and in social CRM?

AD: Gartner estimates that by 2013, 65 percent of customer service interactions will be in the cloud – that includes social media, communities, search and self-service. The customer chooses the channel they want to use, not your company. For customer service, the number-one channel isn't the phone anymore, it's Google. Next, with a half-billion people on Facebook and more than 75 million on Twitter, any plan for social media and customer service needs to address how all these channels connect with your existing customer service processes. **CIS**

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by Brendan Read

Automating (and Visualizing) the Conversations

Interactive voice response (IVR) – both DTMF and speech rec – enable contact centers to cut costs by diverting simpler calls away from expensive live agents and by shortening the time spent in person-to-person exchanges through capturing and screen-popping basic information to the staff. Yet too often many of these applications: the technology and the setup, including scripting have resulted in poor customer service, which risks alienating customers and their dollars.

With a greater realization that retaining customers are equal if not important a strategy as prospecting for new ones, suppliers and their organization clientele alike are looking at ways to better automate the conversations to keep the callers in the systems, and as customers. These include beefing up their IVR systems, examining and deploying outbound IVR and looking into automated video i.e. interactive voice and video response (IVVR).

Customer Interaction Solutions contacted several leading firms to get their insights on IVR and IVVR applications. The questions posed covered general trends, DTMF versus speech rec, outbound IVR and IVVR. Owing to the space available in our print magazine we have included only their responses to general trends. Instead we have posted the entirety of their replies at www.tmcnet.com/32734.1. Please peruse them for information and advice on how best to automate (and visualize) your customer interactions.

Angel.com (www.angel.com)

Dr. Ahmed Bouzid, Director of Product Management

The old centralized large call center is quickly becoming a thing of the past. Instead, we are witnessing the emergence of distributed, small and informal contact centers. The main driver of this trend is the move by the enterprise from building expensive on-premise installs to adopting hosted or managed contact center solutions. Now that the enterprise is convinced that it is not a passing fad, the cloud is no longer considered a risky experimental proposition, but a viable business option. With this move, the deployment of IVR solutions is now finally in the hands of experts who know how deploy highly usable IVR applications, rather than IT engineers who are tasked with a project whose budget is consumed mainly with the low-level challenges of setting up the infrastructure to just get things to connect appropriately. Deploying in the cloud on an already existing and ready-to-use infrastructure shifts the budget equation in favor of spending the precious dollars on the design and testing of IVR applications, rather than on coding and telecom configuration. This will lead to the deployment of increasingly usable IVR applications.

Avaya (www.avaya.com)

Michael Perry, Director of Contact Center Product Management

[Of the trends] we are continuing to see much more outbound IVR applications getting deployed, and companies are seeing the benefits of reaching out and proactively notifying customers of pending activities and events. These types of applications are saving companies potentially millions of dollars while driving up customer satisfaction at the same time. The ability to head off inbound customer calls for routine things like shipping confirmations and appointment reminders, while providing customers with something of value is of tremendous value and we're seeing more and more of these types of applications getting deployed every day.

Convergys (www.convergys.com)

Scot Harris, Director, Market Planning and Strategy

The struggling economy and reduced consumer spending are

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not only putting pressure on enterprises to retain precious customers, but to do so in as cost efficiently a method as possible. Recent surveys have reported that 85 percent of consumers believe customer service is an important factor in continuing to do business with a company. Since the IVR is usually the "voice that answers the phone" when customers call, providing them with a personalized, information-rich automated interaction helps to keep customers satisfied cost effectively.

Shifting demographics – with "Generation X" and the "Millennials" gaining spending power – and easy access to information via the Web have created customer bases that have much higher customer service expectations. This increased expectation, coupled with rapidly growing mobile phone use is driving enterprises to enhance their customer service offerings to allow easy access to up-to-the-minute account information from anywhere at any time. Over 20 percent of all U.S. households have dropped landlines in favor of using cell phones exclusively for voice communication, according to recent survey results from the National Center for Health Statistics.

CosmoCom (www.cosmocom.com)
Steve Kaish, Vice President,
Product Management and Marketing
There are three main trends I see:

1. As business becomes increasingly fast-paced and competitive, call centers are making more modifications more often to their IVR to respond to those changes;

2. As self-service and sophisticated routing applications become more pervasive, integration with multiple back-end systems is becoming increasingly common and important; and

3. The need for business agility and lower operations costs has made seamless integration between the IVR and the rest of the contact center infrastructure i.e. ACD, CTI services) more important. When the IVR flow and ACD routing rules are managed in a single interface, and the IVR collected info is automatically part of CTI info for screen pops, the cost of and complexity of initial implementation and day-to-day operations is dramatically reduced.

Nuance (www.nuance.com)
Dena Skrbina, Senior Director, Solutions Marketing,
Enterprise Division
Nuance sees three key IVR trends in contact centers. These include:

1. Self-service solutions designed to generate customer loyalty

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IVRs were created to save businesses money. In the past, systems were too focused on the needs of the business with no consideration for the customer experience. A well-design, self-service solution empowers the customer and understands their needs. The result: increased adoption, improved task completion rates, higher satisfaction, and in even more savings for the business. Businesses today know more about their customers than ever before. Using that customer knowledge, they are executing self-service strategies with a re-inspired focus on increasing loyalty and self-service adoption.

2. Relevant proactive notifications

When the information is relevant and considered valuable by the customer, proactive notifications cut costs, increase customer retention and loyalty, increase revenues and expand business. Being reactive is no longer enough in today's highly competitive and cost conscious business environment. There is a powerful tie between proactive notifications and a company's inbound customer care operation. Blending customer contact operations into one seamless experience can help further satisfaction as well as reduce costs.

3. Cloud-based IVR (hosted, managed service)

Cloud-based solutions are rapidly becoming the preferred delivery model, primarily because they save enterprises money, free up resources and allow companies to benefit from the latest and greatest IVR technology using a shared, flexible delivery model. In a cloud-based model, the entire IVR and speech infrastructure is built, maintained, monitored and operated by a hosting provider.

> "Understanding the experience at the other end of the line enables you to provide the best possible self-service for your callers."
> Microsoft Tellme

Voxeo (www.voxeo.com)
Dan York, Director of Conversations

Consumer expectations for speed, convenience and on-demand information have skyrocketed. While speech and touch-tone driven self-service phone portals are now commonplace, the major trend we see right now are companies adapting their communication and support strategies to take advantage of the widespread adoption of additional interaction channels such as SMS, IM, video, the mobile Web and even social networks like Twitter. This trend is being driven by customer request and preference. Convenience is what customers require and there are situations when making a phone call is not convenient, or a customer simply prefers to send a text message or perhaps start a Web chat session. **CIS**

How to Get Customers to Stay in IVR/Speech Rec

The big challenge with IVR has been to get people to use and stay in the automated self-service systems. Even speech rec can be frustrating sometimes. Therefore automated voice solutions require fine-tuning to maximize their ROI.

Microsoft Tellme (www.tellme.com) has now taken automated voice to that end with Tellme Platform Central, the latest enhancement to its platform. It now allows businesses to understand whether their customers completed their requested tasks in the system, thereby enabling companies to invest efficiently in changes that directly improve caller success, while also providing quantifiable visibility of progress toward business objectives.

In a nutshell that means higher completion rates, fewer zero outs, greater customer satisfaction (always a challenge with automated voice), lower costs and hopefully greater profits.

Tellme Platform Central's features include customizable reporting, which enables tracking performance by tasks and user segments unique to each application and improved application analytics that permits gaining a deeper understanding of customer behavior. It has sophisticated access control: A simple intuitive interface for project-level and resource-level access control. There is also self-services telephony provisioning that permits provisioning and managing the telephony settings for your applications running on Tellme. Firms have quick access to technical documentation via an online library that aggregates documentation and support in single area.

"While automation and call containment rates give a glimpse into IVR performance, these measurements only tell one side of the story," says Microsoft Tellme.

"Understanding the experience at the other end of the line enables you to provide the best possible self-service for your callers." **CIS**

Astute Solutions' (www.astutesolutions.com) new RealDialog 3.0 knowledge management and e-services solution is aimed at providing high quality, online service experiences. RealDialog 3.0 has a conversational virtual assistant that can be launched on a company's web site. It can resolve a majority of customers' routine and complex questions/issues online and deliver precise answers and interactive guidance through CRM or contact center application to help contact center agents resolve issues quickly. It improves the speed and quality of e-mail, chat and social media responses by delivering pre-approved, branded replies. It provides employees and corporate partners, instant access to a wide variety of systems and documents across the enterprises through a single knowledge engine. Through a fully-customizable interface, it supports numerous functions, organizations and industries. Additional applications include facilitating e-commerce transactions, supporting technical help desks, providing dealer and franchise support and delivering human resources support.

Interactive Intelligence (www.inin.com) has enhanced its communications-as-a-service (CaaS) offering. It features a new CaaS Portal that provides a centralized Web portal for administration, configuration and billing. The company is also adding hosted workforce management functionality including forecasting, scheduling and real-time adherence. Also new is a hosted agentless dialing (outbound IVR) application which provides automated outbound messaging, text-to-speech database look-ups and an option for called parties to be routed to a live person via "smart" call rules.

IBM (www.ibm.com) has come out with new predictive analytics software, the IBM SPSS Modeler covering data mining and text analytics that monitors changes in consumer, constituent and employee attitudes, uncovers deeper insights and predicts factors that will drive future customer acquisition and retention campaigns. The solution especially targeted to enable firms capture vital information from social media, plus e-mail and IMs by extracting sentiment from emoticons and slang terms that people often use in that channel to describe their views toward a product or service.

The IBM SPSS Modeler analyzes trends and captures insights from industry-specific terms. Within these domains, the software includes new semantic networks with 180 vertical taxonomies from fields including banking and insurance to consumer electronics and life sciences and more than 400,000 terms, including 100,000 synonyms and thousands of brands. It uses natural language processing to allow firm to pull key concepts, opinions and categories relevant to their business from these data sources to uncover deeper customer insights. Organizations can combine their structured data with textual information from documents, e-mails, contact center agents' notes and social media sources.

Knouen Technologies' (www.knouen.com) new Knouen OfficeSync 3.0 for Siebel CRM features automated Siebel updates and integrates social networking and sales intelligence capabilities. Knouen OfficeSync's data connector gadgets enable users to login to sites such as LinkedIn and Jigsaw and pull valuable information from these sites directly in to Microsoft Outlook. It integrates structured and unstructured data in one convenient interface that gives users a more complete view of their customers and prospects. The Knouen Sales Assistant feature automatically background-logs interactions with customers, such as e-mails and appointments as activities in Siebel. Knouen OfficeSync 3.0 also provides tighter integration with Microsoft Outlook, expands role based configurations that allows options to be set at the role level, and

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supplies improved Siebel configuration support. A new application monitoring service proactively monitors Knouen OfficeSync and Siebel to ensure that data is being properly entered in Siebel. Knouen OfficeSync 3.0 also monitors application uptime, server capacity and expiring passwords.

Lithium Technologies (www.lithium.com) has integrated its community platform with customer service software from **Genesys (www.genesyslabs.com)**, an Alcatel-Lucent company. This mashup will enable contact center agents to obtain access to tribal knowledge and proactively engage customer communities, such as community forums and user groups. Enterprises can monitor and address customer issues outside of the center and better understand conversations taking place across the customer community. Lithium can flag community activities that require enterprise attention. The Genesys software suite can then determine the business value and priority and assign that interaction to the ideal resource, be it in the contact center or beyond.

LivePerson (www.liveperson.com) and **Air2Web (www.air2web.com)** have partnered to provide a fully integrated SMS-powered mobile chat solution. AirCARE Mobile Assist enables chat agents to engage with consumers from virtually any mobile phone, from anywhere including in concurrence with online and voice channels. The solution extends live chat capabilities beyond the browser to any phone capable of sending SMS messaging, providing customers with on-demand access from anywhere, deflecting costly inbound phone volume and maximizing agent labor utilization. Mobile Assist also offers pre-packaged chat functionality to facilitate quick deployment.

Manhattan Associates (www.manh.com) has released Distributed Selling, a cross-channel contact center and in-store order entry application built within its Distributed Order Management solution. It helps retailers to offer service and purchase power to customers via external applications such as mobile device, point of sale system or any other application proficient of making web service calls. Distributed Selling provides retailers with full payment processing and financial settlement support for all orders regardless of location.

Microsoft (www.microsoft.com) has released Microsoft Dynamics NAV 2009 R2 that includes integration with Microsoft Dynamics CRM and Online Payment Service. The solution enables eliminating redundant data entries, keeps information up to date in ERP and CRM solutions and permits salespeople to quickly access detailed business information about contracts, pricing and product availability. Connecting into Online Payment Service makes possible processing payment transactions from the Microsoft Dynamics NAV interface across multiple channels, including e-commerce, point of sale and contact center transactions. Remote and roaming users can leverage the Microsoft Dynamics NAV 2009 R2 through the RoleTailored interface access with their local resources, such as the operating system and Microsoft Office.

SysAid's (www.sysaid.com) new SysAid 7.0 has more than 130 capabilities. It features a new SLA (service level agreements) module that measures the quality of support IT departments provide end-users to fulfill existing SLAs. It also has a new user-friendly dashboard in the SysAid SLM (Service Level Management) that collects different SLAs, measures key performance indicators and helps analyze overall service delivery success. Another feature includes the integrated SysAid Calendar, which automatically logs updates to track all activities, due dates and software support expiration date, and may be fully synchronized with Microsoft Exchange. A new SysAid iPhone application allows users to respond to service requests anytime, anywhere. The Live Chat module has been bolstered with initiating remote control sessions directly from the chat box. There are new integrated SNMP traps that proactively handle simple support issues such as printers out of ink and incoming and outgoing data rates that fall below thresholds. A new SysAid report building wizard creates customized reports; the End-User Portal is now available in 44 languages.

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by Brendan Read

The Social CRM Revolution

The customers have stormed the corporate palaces and are now taking charge of their customer relationships. Armed with information from the Web, backed by "do not contact" and privacy laws that had been obtained in appeasement attempts and mobilized through social channels, customers are sweeping aside 'today's advertising "Mad People" and are suppressing the fire from public relations flaks.

Instead of customers serving the companies, the companies are now being forced to serve them. If these outfits fail to do so, and/or not meet customers' satisfaction they will be locked in the stocks or for the most serious offenders by dragged into the guillotines in the virtual public squares.

Welcome to the Social CRM Revolution

Product/service commoditization and virtualization i.e. hardware now as software, software hosted instead of premise-licensed, along with global R&D and sourcing enabled by near-instant information and knowledge delivery, and aided by deregulation, portability and open platforms have made this revolution possible. Customers can switch suppliers more readily than ever before. Brand loyalty is now earned by results gained by buyers and their peers; it can no longer be manufactured, developed and maintained through advertising, marketing and PR.

In the social CRM revolution, it is the customers who are now directly driving product and service creation, saying they need X and want to know how are companies going to provide this rather than the traditional approach of firms making X and saying customers need it, reports Martin Schneider, senior director of communications at SugarCRM.

Consequently, firms are now learning to build products based on meeting unmet needs through such engagement with customers, he says. This is a potentially more efficient and profitable manner in an increasingly resource-scarce world by creating what customers say they want rather than educated guesswork by senior management and tools such as focus groups.

"The balance is shifting in product and service development, branding, marketing and PR from the company to the customer," says Schneider. "The customer is in control of the conversation and the brand. That is frightening to many firms. Yet it also poses opportunities because if you give customers good products, services and information and involve them they become your marketers and public relations people and they are believable and relevant compared with traditional advertising, marketing and PR."

Social Characteristics

To create or, for most firms, revise their existing CRM strategies with the social CRM revolution, there needs to be an understanding of the social channel's key distinguishing characteristics from the other interaction methods: voice, one-on-one chat, e-mail, IM and SMS and in-person.

The first marker is that the social channel provides synchronicity and speed to one-to-many (i.e. customer to peer, company to customers) exchanges via web sites' comments sections and specialized site postings, explains Paul Greenberg, president, The 56 Group and author of "CRM at the Speed of Light." There is near-immediate bidirectional communication to and with the audience universe that exponentially adds to the impact of the information being communicated, whether a complaint, comment or recommendation about a company, product or service or employee.

"If I need to converse with a peer I can go into the social channel and get a response and a response to a response where in a more traditional mold, such as e-mail or IM I send an e-mail or IM, I wait, you send response, you wait," Greenberg points out. "With the social channel therefore you're not just communicating with a single individual but you're also communicating with a group of individuals who can then communicate with other groups of individuals, which you don't have that as much as in other channels."

The second and arguably the most unique and important characteristic of the social channel is that it changes the customers' value to enterprises. It forces them to analyze and monetize one of the most important, long-known and very effective but often set aside facets of customers, and that is their ability and power to influence other customers.

Greenberg cites the work of Vita Kumar, professor at the Business School at Georgia State University, who devised a new metric, customer referral value (CRV) that extends traditional customer lifetime or net present value to assess this added worth. CRV is defined by four questions: (1) would you recommend this company to someone you know; (2) did you recommend this company to someone you know; (3) did they become a customer; and (4) are they a profitable customer.

"The traditional CRM metric is net present value, which is a history of repurchasing," explains Greenberg. "Now because the social customer is out there and communicates with other customers they have a value that goes beyond just repurchasing. If they are your advocates, they can have an indirect impact on revenue."

One of the strengths of the advocacy approach, Greenberg points out is that it taps into the power of customers' emotions. This advocacy model is powerful and proven. He points to the example Karmaloop, which uses "virtual community retailing." Its active evangelists, organized into "street teams," comprise close to one percent of its roughly one-million-strong network of customers. Yet this group which participates in Karmaloop's clothing sales and community activities generate 15 percent of its revenues.

"The referral model says the way we understand and view our customers is quite different in a social CRM strategy; it is 'we want to get these customers to be advocates as opposed to telling the customers what channels they can come to and to get the customers to simply like us or at best not to lose them," Greenberg points out. "It is the idea that we have to move from managing customers to engaging customers, on the practical level i.e. value of product and service but also on the emotional level which changes again what companies must do as part of their business strategy."

Anthony Lye, senior vice president, Oracle CRM, says listening to brand conversations via the social channel provides an opportunity for organizations to capture information that is relevant to marketing and sales (for example, qualification of a lead) earlier in the process. Customer conversations provide insight into what customers want in new products and enhancements that can be fed into product development process.

Moreover, conversations online are documented and typically can be accessed for long periods of time. With search capabilities on the Web, these conversations can be viewed repeatedly by growing audiences. People, and organizations, can follow the conversation threads and gain access to broader answers to their inquiries.

By listening to these social conversations firms can also identify key influencers and advocates that will help them prioritize their replies appropriately to ensure that they maximize positive impacts with their responses. Prior to the advent of the social channel was difficult if not impossible to accurately identify influential customers.

The social channel also poses opportunities for companies to drive customer interactions to lower-cost channels such as self service. For example, customers requiring support can find and share information with their peers and dynamic chat or web sessions (these should be monitored to ensure advice accuracy and avoid more problems) that avoids costly help desk calls or field service visits.

> **"Because the social customer is out there and communicates with other customers they have a value that goes beyond just repurchasing. If they are your advocates, they can have an indirect impact on revenue."**
>
> Paul Greenberg, president, The 56 Group

"People trust comments, ratings and solutions from 'people like them' who provide this content," Lye points out.

Social CRM Challenges and Solutions

When rolling forward in the social CRM revolution there are obstacles and ways to meet them either head-on or around them. The most fundamental is ensuring and maintaining customers' control to keep their loyalty. There must be cross-channel integration so that companies receive customers' inputs at or close to real-time as possible so that they can present individualized offers. There has to be engaging social channel experiences, such as contest participation, communities and forums that encourage customer problem solutions or interactions with executives and other company employees, or countless other possibilities.

"For customers to stay loyal you have to create not just products and services which has been the historic pattern but also products, services and tools and consumable experiences that gives the customers more control over their experience with a company," says Greenberg.

Another key challenge with the social channel is avoiding the temptation to focus only on the "influentials" identified by social channel monitoring tools. For the actual power of individual buyers may go far beyond what they say online; they still use "offline" channels to interact with each other and their peers.

There is a risk from the brand sentiment and support perspectives in listening only to the squeaky wheels: those individuals who are being proactive and identifying themselves on social channels.

"For if you think this is the average attitude and sentiment you're probably wrong," says Schneider.

Savvy customers also know what to say or not to say online. For example those who have political or religious involvements, or have outside activities that are non-conventional may keep that information off the social channel if they feel revealing this could hurt their careers and businesses. Yet these customers often interact with and influence many others.

"You never really know who your customers are," Schneider points out. "So rather than spending resources trying to find those squeaky wheels, and fumble over trying to get on their good terms, treat every customer who calls in if they have 20,000 followers on Twitter and they had a blog read by 10,000 people a day. And assume everyone is an advocate and influencer and that way the contact center agents are going to be on their best behavior and provided policies and processes and give them top-quality service and support."

Another key issue with the social channel is that the information accessed by these means often has limited shelf life. An individual's LinkedIn profile and what they are doing on Facebook and Twitter is as only as relevant until the next post. Yet traditional CRM customer data analysis methodologies take months before they can adjust customers' values and recommend attractive and optimal offers Joe Hughes, senior executive in Accenture's Global Systems Integration practice. Instead, firms need to make social site snapshots via feeding tools from firms including Alterian (formerly Techrigy) or Radian6 to capture these developments, score them and deliver offers rapidly: ideally on the next interactions. Social channel-obtained information can be appended to customers' files in real time with technologies such as from Attivio. While in doing so organizations risk having imprecise data such as news feeds on the company based on a set of sales-relevant keywords like "cost cutting" the benefits outweigh the downsides.

"While enterprises do not want to lose fidelity in a complete customer data analysis, they have to deal with speed to obtain maximum value even at the price of a little imprecision on the way," says Hughes. "After all, would you rather have incomplete actionable snapshot or wait until get 360 degree view in a relational database in two years?"

The social channel also pumps out a lot of data "noise", Oracle's Lye points out. With so much data and most being not relevant, reliably identifying content that should be pushed through a business process is a key requirement. Using natural language processing and analytics to intelligently categorize content and classify it in the context of organization's business provide insight into opportunity to serve customers better.

Integration with CRM can provide auto-routing of relevant content from social channels to appropriate people who can manage the request in the context of the CRM process. For example, if an issue related to a product is detected from customer conversations, this information can be automatically routed to contact center agents with proper classification and context so that service personnel can be more productive and respond with proper actions.

Social CRM, Technology and Sugar 6

A key facet with social CRM is that it is not so much technology that drives and enables as it is customer education and process. CRM solutions firms are responding with a combination of education and enhancements to their existing offerings.

Sugar 6, which has just been released, embodies this by integrating with several new social tools, including feeds such as Twitter and collaboration such as LinkedIn. These features pull in what customers and prospects are saying about companies. They enable enterprises to know who the customers are and rank them in priority and to build up personal rapport with these possible buyers when sales reps call or they call them e.g. "I saw on LinkedIn that you're a semi-pro in golf; so am I."

The Sugar 6 tools populate the customers' files behind the scenes, which permit sales team members to execute traditional CRM tasks such as e-mail campaigns without leaving their screens. These new features are built into the Sugar 6 at no extra charge.

SugarCRM is also educating its customers, which are largely B2B, about the social channel in the context of the others they use on how to use it for lead generation and qualification, updating their records and to resolve urgent support issues. Leveraging the Sugar Cloud Connectors for LinkedIn, Twitter, Hoovers, ZoomInfo and other social networking utilities, companies can now import vital social profile data about their customers directly into Sugar 6. Using Sugar Studio, end users of Sugar 6 cannot view and import that data, but also interact with their customers through these social channels.

"You don't build social CRM products," explains Martin Schneider, senior director of communications at SugarCRM. "You bring social channel management into existing CRM." **CIS**

"Learning from the content and the outcomes of business processes will add real value in streamlining the process and reducing the overhead," says Lye.

Firms must also integrate the social channel with the others and with their work processes to obtain and act on having a complete view of customers (more about that in the September Multimedia Contact Center feature). Doing so creates an opportunity for "the social workplace." If customers can chat with other about companies, companies can do likewise internally about them e.g. between customer service, sales, retail outlets, engineering and billing.

That is one of the key benefits of new collaboration tools such as Salesforce.com's Chatter. It enables employees and others on the teams such as consultants to follow key information such as customers' purchase, delivery support and payment histories: much like friends on social networking sites so they receive updates when status changes.

Such real-time information sharing helps sales reps stay on top of critical information and can post a status update before calling customers to find out more about open service cases or account issues. Being on the same page through Chatter helps employees work with the most accurate, holistic view into critical business information whether it's around customers, suppliers or partners.

Chatter also permits document sharing; teams can work collaboratively on documents such as RFPs and purchase and service contracts. With it, employees can follow that document so they are alerted in their Chatter feed of any status changes whether it happens weeks or months later, all from a secure browser, so they're collaborating around the most current version and using the most accurate information. It also enables them to bring in insights from Facebook and Twitter for monitoring the social channel from a unified, real-time Chatter feed (see cover story).

When implementing a social CRM program be cognizant of the differences between integrating a CRM strategy with a social network such as Twitter, Facebook and LinkedIn versus that of a collaboration platform e.g. Jive, SharePoint, Yammer, Salesforce.com Chatter says Eryc Branham, managing director of Acumen Solutions.

Social networks are by definition, peer-to-peer interactions across a very broad range of topics, from personal to business and everything in between. Companies who tap into social networks generally want to provide a superior customer support experience or extend their marketing presence.

In contrast, collaboration platforms are broadly focused on enhancing employee productivity via document, wiki, and idea sharing. It has long been considered a company best practice to break down the "firewall" and extend these collaboration activities to their customers as well, via customer forums, communities, etc., which begins to look like a specialized social network.

"The business objectives and benefits between these two social CRM approaches is very different and requires a different set of strategies, processes, integration approaches and even governance," Branham points out.

> **"You don't build social CRM products. You bring social channel management into existing CRM."**
>
> Martin Schneider, senior director of communications, SugarCRM

The most important challenge in enabling social CRM, argues Greenberg is institutional; unfortunately, most companies don't have that sophisticated a view of it. He recommends creating customer advisory boards to help generate social CRM strategies, programs and policies, getting executive buy-in and to map customers' experiences. With these boards firms can find out what processes and interaction points may need to be modified.

"Most firms really don't have social CRM strategy," Greenberg points out. "What they're developing is a CRM strategy to run their sales, marketing and customer service operations and incorporate some social features in consideration of that strategy. Consideration doesn't mean they have a fully-integrated highly mature look at how they change the business model. All they have is guidelines. Yet they have to fully understand the power of the social channel and how it can help them positively impact their organizations because their customers are social." **CIS**

The following companies participated in the preparation of this article:

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www.accenture.com

Acumen Solutions
www.acumensolutions.com

Oracle
www.oracle.com

Salesforce.com
www.salesforce.com

SugarCRM
www.sugarcrm.com

The 56 Group
www.the56group.typepad.com

A Customer IP Communications System Roadmap

Rule #1 for upgrading your enterprise communications system: Don't waste time with an RFP and wading through responses. Instead, the best way to successfully choose and implement a new system is by preparing a system roadmap first. To make an informed decision when preparing such a roadmap, it's vital to know what systems currently exist, the justification factors for a new system, what's coming by way of next-gen solutions, and recommended planning guidelines to help you move your communications system forward.

Today's enterprise communications system

For most of the past decade, the trend for enterprises has been to migrate from traditional circuit-switched PBX phone systems to those based on Internet Protocol (IP) communications standards, which have been developed for the transmission of media communications and control signaling requirements over an IP network. Though IP systems offer various design options, including IP-enabled and hybrid TDM/IP configurations, the most utilized model is a softswitch based on a traditional client/server architecture topology.

Today's softswitch design leverages industry standards, primarily Session Initiation Protocol (SIP) and Services Oriented Architecture (SOA), to enable compatibility between the system and third-party applications. Current softswitches, likewise, use standards-based hardware, including a centralized control server, IP-based endpoints, and media gateways that support traditional TDM endpoints (analog station and PSTN trunk interfaces). Unlike the proprietary equipment required for IP-enabled and hybrid designs, softswitches utilize non-proprietary standards-based hardware often available off the shelf.

With the continuing emergence of unified communications (UC) and in ideal configurations, the softswitch control server supports fully integrated UC services, along with traditional telephony requirements — an all-in-one design that simplifies system configuration and provides optimal communications capabilities.

Justifying an IP communications system

A new IP communications system should be viewed as a business asset and not an expense item. Therefore, effectively justifying the move to an IP system comes down to hard cost savings, productivity and peace of mind, mainly in the form of:

- Reduced hardware costs, owing to fewer hardware elements; the use of nonproprietary third-party servers, media gateways and SIP telephone instruments; and PC-based softphones in place of more expensive desktop devices.
- A single shared voice/data IP network infrastructure, which reduces installation costs, ongoing maintenance expenses, and time-consuming move/add/change (MAC) operations.
- Enhanced system survivability and resiliency, based on fewer points of potential system failure; fully redundant geo-distributed control server options; pooled media services and gateway resources; and alternate transmission signaling paths among servers, gateways and endpoints.
- A centralized data center system, meaning more efficient administration, more manageable growth and network expansion, shared application resources across locations and greater user mobility across the network.
- SIP trunk services that provide significant cost savings through a reduction of PSTN TDM hardware interfaces and fewer off-premises trunk circuits for local, long distance, and E911 transmission requirements.
- Teleworking from anywhere, which can reduce costs for office space and overhead, and increase the production of road warriors via connections to the enterprise system using a PC softphone, Web portal or smartphone.
- Unified communications for cost/time savings and productivity features such as presence management, IM, calendar access, unified messaging, self-managed audio conferencing, Web collaboration, and desktop video communications.

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by Ilan Sulkin, TEQ Consult Group, and Brad Herrington, Solutions Marketing, Interactive Intelligence

The unified contact center solution

A unified all-in-one IP solution lets an enterprise easily make all system subscribers available to support contact center operations. Beyond a formalized agent group configuration, co-resident enterprise users with unique work/knowledge skills can offer expertise for customer service, or simply provide back-up whenever call volumes spike and agent staffing isn't sufficient. All call scenarios also get the benefit of things like monitoring, reporting and an analysis of each call, regardless of who participates or how the call is handled across the enterprise.

If an IP system is configured on a SIP-based network for contact center operations, an added advantage is multi-modal functionality and the ability to collaborate and exchange information among dispersed call participants. Networked unified communications tools also are easily applied to contact centers: presence/IM helps agents determine the availability of other agents or experts to address a specific issue; conferencing services facilitate connectivity among multiple parties; mobile solutions support roaming or off-site agents; and teleworking options let you support home agents virtually anywhere.

Next steps in enterprise communications

Several enterprise communications innovations are now in the development or just-released stage, and one such solution worth note is business process automation, or BPA. In essence, BPA is the automation of multi-step people-centric processes (document management included) using enterprise telephony, unified communications and contact center technologies and practices to distribute work. An IP communications system is actually a sound platform for BPA with its inherent SIP/SOA capabilities, interoperability with third-party applications, and ability to support BPA's objectives of reducing the latency, human error and costs associated with communications contacts and the flow of information.

Planning guidelines for a new IP communications system

Before ever launching your new IP system, it's just good business sense that a comprehensive communications strategy be well-defined and in place — and that it addresses the objectives of your enterprise's overall business thinking. To identify how a new system can contribute to objectives, such as revenue enhancement, cost reduction, competitive positioning, market expansion and improved customer service, following a few key guidelines can help.

Avoid a "one size fits all" system approach by specifying the distinct communications needs of different system subscriber communities. At a minimum, evaluate station user requirements based on individual user roles, work functions and responsibilities, plus cross-relationships with other users. Weigh the needs for traditional telephony, unified communications and contact center capabilities across lines of business, too.

> **If an IP system is configured on a SIP-based network for contact center operations, an added advantage is multimodal functionality and the ability to collaborate and exchange information among dispersed call participants.**

Educate and gain the support of all stakeholder groups at the beginning of the planning process. Establish a task force to identify existing communications issues and collect users' input for desired features in a new system, and to determine how the system will correct or improve current shortcomings in the communications/business process.

Plan an incremental implementation approach across the enterprise network for manageability, and to avoid too much change at once. If possible, avoid a flash-cut conversion of a multi-system network into a single virtual system design. And for large networks, plan to utilize a mix of old and new communications system platforms while gradually migrating on a site-by-site basis based on communications needs.

Conduct group (user) trials for new applications and capabilities, phasing in a few features at a time such as presence/IM and web collaboration. Along with each "feature launch," ensure sufficient training and help desk support for system interfaces (telephones, soft phones and mobile clients), at the station user level, executive level, and for administrators and contact center personnel. **CIS**

by Brendan Read

‘Listening’ to Your Customers

To succeed in business, whether for-profit or non-profit, you must deliver what customers want to buy with the right mix of features and pricing plus high quality in the offerings and the service, sold in more-than-sufficient volumes. To meet this prime objective you must find out from and “listen” (hearing and reading) to your customers and analyze in a very timely manner what they have said for insights that will guide you in developing and improving your products and services.

One means of doing so is gathering, analyzing and drawing inferences from operational data such as first contact resolution and repeat calls and e-mails i.e. customers would not be happy with companies if they had many interactions on the same matters. Yet you do not hear or read what they are saying, good or bad. Call recordings and chat and e-mail captures are one such set of tools to obtain these “voices of the customers (VOCs).” The information they provide, obtained via speech and text analytics is limited though by what is there; if you wanted to find out what customers thought of your product or would they recommend your firm to someone they knew you have to ask this.

Customer surveys, launched at or shortly after their exchanges, provide direct insight by eliciting meaningful insights with well-drafted questions. However, there may be other departments that customers also interact with that wish to survey them too. With individuals’ time and patience limited, your entire organization runs the risk of annoying them with too many inquiries and forms.

Enter EFM

Enter enterprise feedback management (EFM), which is a sophisticated set of software that centrally manages survey creation, deployment and analysis that is available to multiple corporate users. With EFM, departments can collaborate in creating questions that can generate rich insights that could help each of them: Engineering/service design, distribution, marketing/sales and customer service and support create more profitable offerings.

EFM tools are deployed via the Web and increasingly through IVR and SMS. They are becoming optimized for mobile access as more consumers rely on wireless than on landlines. Most EFM solutions are hosted as opposed to licensed and premise-installed software. There are also EFM applications built into contact center routing and workforce optimization (WFO) packages.

According to Jim Davies, research director of Gartner, EFM tools have three key benefits. First, they are cost-effective compared with running numerous siloed survey tools across organizations. Second, they permit correlations between different surveys from which companies can see patterns such as the correlation between contact center agent satisfaction and customer satisfaction with the same firm. Third, the coordination feature avoids bombarding customers with surveys.

Companies are applying EFM solutions to capture feedback that can be used for operational and strategic benefit. Gary Schwartz, senior vice president, marketing, Confirmit explains the difference. Consider this strategic example: survey data is aggregated across an entire customer base or filtered to view individual segments, i.e. “why do my highest value customers fail to recommend my business to their friends and family?” Operational feedback is driven by individual customer responses to any question in a survey. This allows agents to contact those customers again to address their specific problems.

“Historically companies would rely on annual relationships surveys to take a periodic, often generalized, pulse of their customer base taken from a small, but hopefully representative, sample of customers yet this type of study took a long time to report results into the business and therefore was not always actionable,” explains Schwartz. “We now see a trend of increased desire to run relationship surveys alongside transaction-specific surveys. The EFM solutions now enable surveys to be conducted cost-effectively over a larger sample size and more frequently with immediate and actionable results, with both strategic and operational benefit.”

Justin Schuster, vice president, enterprise products for MarketTools is seeing greater demand for and utilizing EFM to obtain more in-depth and actionable results. Companies want to find out what is driving NPS (net promoter score, a key loyalty metric) rather than tracking NPS. MarketTools is helping its clients use feedback to identify which performance aspects such as time to resolution, agent knowledge and courtesy that have the greatest impact on satisfaction levels. There is also more interest in running EFM programs to reach out to customers globally, which he says "introduces interesting nuances, such as translation requirements and the need to normalize data to account for cultural bias."

Managers are also seeking guidance to address key service issues. Mindshare's new Mindshare Coach provides just that with specific "where" and "how" recommendations. The technology, which uses data mining and statistical analytics examines the customer experience elements, prioritizes them, and suggests improvements which will have the greatest impact on customer satisfaction and loyalty.

"Managers don't have hours each day to dig through customer feedback and then determine the best course of action, and they aren't generally trained in statistical analysis," said Richard Hanks, president of Mindshare.

EFM Challenges and Solutions

There are challenges in employing and obtaining senior management approval for EFM solutions

A longstanding obstacle with customer surveys both individual applications and EFM is achieving sufficiently high response rates to generate valid impressions of customer attitudes, reactions and sentiments. Customers have often been reluctant to fill out surveys: the exceptions being those who are very annoyed with firms or rarer still have had exceptionally great experiences.

Suppliers, along with professional services partners have been working with enterprises to increase response rates, reports Davies, by finding means to "create a sense of connectivity with participants and organizations." Examples include personalized e-mails, Web forms or IVR scripts with customer information to prompt them to listen or open the communications. Also, questions are being shortened with the right phrasing to minimize the time they spend on providing the answers. The surveys are increasingly and, where appropriate, fun to answer such as with audio or cartoons compared with checking off boxes.

> **"By letting customers know it was worth their time to complete that survey because they have been listened and action was taken on what they've said, the next time they get a survey they will be even more willing to fill it out because they know their voices are being listened to."**
>
> Jim Davies, research director, Gartner

"If a survey looks like a generic e-mail or sounds like a standard IVR pitch they are going to get ignored," says Davies. "If it looks or sounds personal and it will not take a lot of time to fill out and interesting your customers more likely to respond."

Predictive Analytics and EFM

Organizations may want to consider using predictive analytics on survey data collected by EFM solutions to figure out what customers will want to buy next. Predictive analytics informs and directs decision making by applying a combination of advanced analytics and decision optimization to both structured data, such as surveys and to unstructured data, like that gathered from social media. It can help companies gain "customer intimacy," such as in-depth knowledge that can help develop deeper and more rewarding customer relationships, explains Heena Jethwa, predictive analytics strategist, SPSS, an IBM company.

Most organizations start their customer-focused activities with either a predictive analytics or an EFM approach, said Jethwa. In many cases, both may be undertaken to a certain degree, but each is deployed within different and siloed departments. For example, an organization's CRM department might use predictive analytics based on existing CRM data, while the customer insight/market research department focuses on more attitudinal data gathered from surveys or focus groups.

"Both approaches are very valuable," explains Jethwa, "however, the power of customer intimacy emerges through transforming the siloed philosophy to combine both practices, encompassing all the data across the entire enterprise, thus combining these valuable data elements to drive more actionable and accurate insight to determine what customers will want next." **CIS**

Customers are actually increasingly interested in expressing opinions and interacting with companies, however their tolerance for being researched is dwindling, reports Amy Pressman, president and co-founder of Medallia. Her firm advises her clients to build surveys that feel more like a dialogue than an interrogation. Surveys should be shorter and more focused on what the customer wants to communicate rather than what researchers want to know.

"The objection is often that shorter surveys make it harder to detect trends at an actionable level," explains Pressman. "To overcome this obstacle we introduced text analytics capabilities into the application. This year these will be significantly enhanced. This capability allows companies to detect emerging issues and topics without having to specifically ask detailed and structured questions."

Equally if not more importantly EFM firms, services firms and companies should look at informing customers in their survey scripts that their previous responses have had impact, observes and recommends Davies. That can include as examples sending the agent whose service they had problems with on a training course or redesigning the button on the oven they had bought and called about to make it easier to use.

"By letting customers know it was worth their time to complete that survey because they have been listened and action was taken on what they've said, the next time they get a survey they will be even more willing to fill it out because they know their voices are being listened to," says Davies.

As customers shift from landlines to wireless for voice and text-based channels this is posing new challenges in attracting them to and enabling their responses to surveys. Mobile devices use a wide array of platforms that applications must mesh with. Their small screens and keyboards, both tactual and virtual make survey replying difficult to accomplish.

EFM suppliers are responding by adding support for BlackBerrys, iPhones and smart devices, reports Davies. The solutions now permit wireless users to surveys such as by pushing buttons on iPhone screens as opposed to having them clicking off on e-mail links that go to Web sites. Down the road are speech-recognition-based solutions that collect responses off responses to directed-dialogue interactions, converting speech to text.

Confirmit's Confirmit Contact Center solution, consisting of a questionnaire and reports, captures transactional data quickly via IVR and Web channels. Its Horizons V15 release includes Confirmit Flex, a methodology that permits both it and its clients to add features and functionality as they are created instead of waiting for the next release. Confirmit has also released a Flex application that allows feedback capture directly on the iPhone, using the iPhone's native user interface so that it looks like the customer is interacting directly with the iPhone, not a browser on the device. That makes responding to surveys easier, faster, more intuitive and more likely to happen.

The Integrated EFM/Routing WFO Option

One EFM solution option is those that are pre-integrated into routing or WFO solutions. This choice has several key benefits that are worth weighing up against stand-alone and typically say some analysts, best-of-breed offerings. These include lower total costs of ownership by reducing the number of servers. They can directly capture operational data such as from the ACDs, and link into recordings, such as Verint's Impact 360 Customer Feedback integrated WFO solution that provides managers with review and analysis capabilities. They can also readily launch automated invitations to participate and can transfer callers to surveys automatically. These features within the same solution enable companies to easily drill down, uncover and if need be act quickly on the root cause behind customers' comments and complaints.

The automated invitation feature is important as it avoids having agent bias creep in, points out Gina Clarkin, product manager for Interactive Intelligence, whose Interaction Feedback application is an add-on to its Customer Interaction Center all-in-one IP Communications software suite. When agents or employees control the survey decision process and must ask the customer if they would like to provide feedback, those agents or employees typically only extend the survey invitation on "good" interactions. In these cases, the organization will likely get a biased view of customer perceptions.

"Often, it is the unhappy customers that provide actionable information to improve service," says Clarkin. "Removing the agent from the survey decision process increases the reliability and quality of survey results."

Interactive Intelligence is developing new features to help gather customer feedback. One of these is agentless outbound surveys via SMS. Another, being created in partnership with Buzz International, an IT integration firm, is the ability to capture customers' comments in Twitter tweets and send alerts to firms. The alerts would be sent to the right departments by CIC's multichannel routing feature. CIC would also track the alerts.

"Sometimes a customer will tell you what they're thinking in a survey and sometimes they won't and then they're going to go out and tweet to the world how annoyed they are," explains Rachel Wentink, senior director of product management for Interactive Intelligence. **CIS**

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Erich Dietz, senior sales director of Mindshare, cautions firms about overusing SMS surveys. If they are too aggressive they will quickly oversaturate the channel and drive up increased privacy concerns among consumers.

"Given how frustrated consumers are with spam we believe they will be even quicker to pull back from SMS if they perceive companies are abusing the channel," says Dietz.

One of the key characteristics of text messages and the social channel is that customer feedback data from them is unstructured, unlike formal surveys. Mindshare's new Mindshare Reveal, a robust text analytics platform allows extracting structured information value from unstructured opinion-based customer comments. It turns this feedback into actionable information using custom rule sets adaptable to corporate culture, products and services.

The rapid rise of social media is accelerating this issue to the point where companies are risking missing large chunks of information that will impact on their ability to effectively respond to customers' needs; they are not fully hearing the VOCs because they have only been capturing solicited feedback through surveys. Chris Cottle, vice president, marketing, Allegiance, calculates that in some cases, up to 50 percent of all customer feedback is unsolicited. While often businesses do a decent job of answering those questions, they are unable to get that feedback into a database that is reflective of all those conversations so that management can see and analyze and learn about critical issues.

Allegiance has come out with Engage7, which is a multi-channel, integrated VOC platform that gathers unstructured and structured customer plus employee feedback into a centralized system for analysis and action. It includes social media and mobile/SMS feedback management, ad-hoc and transactional surveys and reporting capabilities. It also includes advanced text analytics based on natural language processing to automatically read open-ended feedback. Companies can gain actionable insights instantly without manually reviewing or classifying each comment.

"Businesses are realizing they need to combine the two worlds of solicited and unsolicited feedback to really understand their customers," says Cottle.

As customers turn to social media as a comment and feedback channel, companies need to integrate this mode with EFM to provide, along with call recordings and screen captures, and operational data complete holistic views of their messages. Davies is seeing some EFM suppliers create social community platforms so that clients can engage with their customers such as through blogs, chats and forums. At the same time they can capture comments and interject their own surveys in that environment.

MarketTools' new Community Manager enables rapid creation and deployment of online customer communities that permit organizations engage in real-time conversations with their current or target customers to gain deeper, more comprehensive customer insights. It is equipped with forums and discussions, stories and articles, blogs, image and video galleries and text analysis. It is fully integrated with MarketTools Survey Manager, MarketTools Panel Manager and MarketTools CustomerSat, making it easy for market research and customer satisfaction professionals to apply a comprehensive blend of tools and techniques to gain customer insights.

"The volume of feedback on the social Web has reached a point where customer loyalty professionals are realizing they [also] need to be listening to this feedback source as well," reports Schuster. "Adding social media to an EFM program can yield a number of benefits, including extending the capability of an organization to identify issues early and providing additional mechanisms for engaging customers in a timely manner."

> **"Businesses are realizing they need to combine the two worlds of solicited and unsolicited feedback to really understand their customers."**
>
> **Chris Cottle, vice president, marketing, Allegiance**

One key hurdle in enabling EFM solutions to meet these evolving needs and environments is senior management. Pawan Singh, CEO and chief science officer, PeriscopeIQ, says his firm seeks buy-in at a high enough level to create a cross business-unit (BU) agenda of using EFM in a concerted way. When such "C-level support" is achieved, each BU's EFM efforts are united under a single strategy. Another more common way is to demonstrate results in one BU so that others begin to take interest.

"When we've been successful [with our solution], organizations experience tremendous results and it has given them competitive advantages over their peers," says Singh. CIS

The following companies participated in the preparation of this article:

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www.allegiance.com

Confirmit
www.confirmit.com

Interactive Intelligence
www.inin.com

MarketTools
www.markettools.com

Medallia
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Mindshare
www.mshare.net

PeriscopeIQ
www.periscopeiq.com

SPSS (an IBM company)
www.spss.com

Verint
www.verint.com

FurstPerson, VoltDelta

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

If you always kind of thought that turnover is a consistent problem within the call center industry you win. Recent research from call center hiring solutions provider FurstPerson shows that turnover alone costs organizations $4,284 per term on average.

According to a white paper from FurstPerson, "Searching for the Silver Bullet: Can One Test Alone Improve Quality of Hire?" factoring in the opportunity cost of poor performance "accelerates this cost by a factor of five to ten times depending on your industry and call type."

Some organizations find that using pre-hire assessments supported by empirical based research, job analysis and validation analysis can help improve the quality of new employees. But is using one assessment, the so-called silver bullet the best way to improve quality of hire?

You might have heard of the Big Five model of personality profiling, used frequently to predict turnover in call centers. In addition to that assessment, applicants also need the right skills and abilities to perform well.

Here's the challenge: Hosted call center solutions provider VoltDelta found prospects with requirements worldwide that needed to deploy a modern IP-based call center for competitive reasons, but that lacked the infrastructure to support a carrier-grade deployment. That's a problem.

So to enable rapid rollout of its call center solution, VoltDelta has developed a fully integrated product based on the Dialogic MSP1010 Multi-Services Platform and Dialogic CSP2090 Converged Services Platform with call recording, voice IVR, management and open CTI for integration of third-party applications.

As it sought to implement its hosted IP call center product, VoltDelta found that its prospective customers worldwide wanted to deploy its technology, but in most cases lacked the infrastructure to support a call center in a converged network environment with integrated IP- and TDM-based protocols and advanced media processing capabilities.

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

What Happened to Redundancy?

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

I don't know if you have been reading about the outages that the cloud providers have been having. Rackspace, Amazon, Terremark to name a few have experienced outages in the last six months.

The main selling point of these data centers is redundancy. You know, battery backup, generator (for auxiliary power), in some cases dual electrical grid power feeds.

A vehicle took out a transformer on a utility pole in instances at both Rackspace and Amazon. But shouldn't the battery backup work for at least 45 minutes? Isn't this enough time to kick-start the generator? What about dual entrances for power feeds?

I'm just asking because as we move more and more apps to the cloud – more critical than documents and e-mail – the providers should have redundancy in place. And I understand 99.9 percent means that downtime can be 8.76 hours per year. (There's 8,760 hours in a year.) And four nines mean 0.876 hours of down time. And 99.6 percent uptime means 35 hours of outage per year. (Nothing is going to be up four or five nines any more).

But with voice and medical records and critical business apps running in the cloud, customers (and agents) will need to understand the uptime and redundancy for each DC.

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

OnStar Saves Woman's Life

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

I am a huge fan of any paradigm-changing technology and OnStar – the GM-invented service which integrates a car's computer and a remote call center is certainly one of these achievements. The service does lots of different things, like provide turn-by-turn navigation, but perhaps the crowning achievement of the service is the ability to connect to the call center when the vehicle's sensors indicate there has been a collision.

[To illustrate], a couple was forced into their car at gunpoint near Chicago and a thief forced them to drive to a Currency Exchange to cash a check. On the way to the Exchange the woman was able to hit the OnStar emergency button on the remote control, which alerted the police.

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

2010 IP Contact Center Technology Pioneer Awards

Customer Interaction Solutions realizes that technology is the key to success of every contact center, and we have been editorially detailing the evolution of contact center and CRM technologies for our readers for nearly the past 30 years. We also realize that, with an ever-expanding range of new products and services and new categories of them in the contact center space, it can be challenging for our readers to keep up with the latest and greatest in these solutions.

IP Contact Center 2010 TMC® Technology Pioneer Award™

This is why we research and present the IP Contact Center Technology Pioneer Awards, so we can highlight for our readers many of the best players in this emergent technology that is saving contact centers globally time, effort and capital, while enabling increased quality and flexibility to permit them to deliver award-winning service, anytime, anywhere. Winners have been judiciously selected based on the IP contact center solutions or services that offered stand-out features, functions or capabilities which set them apart from others in the space.

The 2010 IP Contact Center Technology Pioneer Award winners are listed below. To all of the recipients, we offer our congratulations.

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Fonality	HUD Queues for Call Center Edition
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Ifbyphone	Call Distributor
inContact	inContact
LiveOps	LiveOps On-Demand Contact Center Platform
Mitel	Mitel Contact Center Solutions
NICE Systems Ltd.	NICE SmartCenter for the VoIP Contact Center
Noble Systems Corporation	Noble SIPhony
OAISYS	Tracer
RingCube Technologies, Inc.	RingCube vDesk
Sangoma Technologies	NetBorder Call Analyzer 2.0
ShoreTel	ShoreTel Enterprise Contact Center 5,1
Syntellect	Syntellect CIM
Toshiba America Information Systems, Telecommunication Systems Division	Toshiba Strata Call Manager
USAN	Hosted Call Center Solutions
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Brendan B. Read, *Senior Contributing Editor*

How Not to Cut Staff Churn and Boost Customer Loyalty

Contact center agents are on the front lines of relations with customers – in service, support, loyalty, sales, lead generation, billing and collections. While agents' pay and benefits are higher and the hours are steadier compared with retail and hospitality, the advancement potential is limited, the work environment is confining; supervisors are too often incompetent and the occupation has, sadly, low social status.

Not surprisingly, when the economy begins to expand and when other employers start hiring, contact center churn jumps and productivity drops. That especially goes for service bureaus that are often less popular with workers than in-house centers because they have lower compensation, increased layoff/reduced-hours risks thanks to their dependence on contracts and they lack brand name recognition and respect.

So why do contact centers take or allow actions that annoy their existing (and future) employees?

The poster child is Teleperformance USA. It has to pay nearly $2 million in back wages to almost 16,000 contact center workers for overtime violations under the Fair Labor Standards Act (FLSA) under terms of a settlement with the U.S. Department of Labor (DOL).

The DOL reported that the overtime violations "occurred primarily because employees were not compensated for all hours worked when the company failed to pay for breaks that were less than 30 minutes in length, or for time spent by employees waiting for work areas to become available even though their shifts already had started." The agency said that "a small percentage of the employees for whom back wages were computed were misclassified as salaried exempt under the FLSA" – a.k.a. they weren't eligible for overtime and were at management's beck and call.

The scale of these violations did not appear to be just the result of a zealous manager or two. The settlement covers workers in 10 states.

The actions by those reputedly responsible reeks of the most callous and cowardly type of nickel-and-diming that took advantage of vulnerable men and women in a-then tough economy. These staff knew that these workers had few alternatives for employment and counted on them to keep their mouths shut out of fear of being fired and losing what little they had.

Then again, what were Teleperformance's personnel who allegedly allowed these purported violations to occur thinking? This is the pro-labor Obama Administration, folks. A foreign-owned company that messes with American workers is painting a bulls-eye on its backside.

This is far from the first or the last instance of companies playing games with employees' wages. Yet if these outfits think the arrows from regulators hurt, that's nothing compared with the repeated self-inflicted gunshot wounds from ticking off those who deliver their products i.e. their workers.

Contact center employees may be undereducated and from the other side of the freeway compared with management, but they are *not* stupid. They chat, abetted by social media when it comes to the best and the worst places to work.

The first chance agents get to say "hasta la vista" from whom they think is a lousy employer they'll do so. Giving notice? A contact center is lucky if ticked-off agents never come back when they clock out. Agents have been known to whip off their headsets and walk out in the middle of their shifts. If this happens enough, in no time at all the quality sinks, drawing only the most desperate and ill-informed to replace those who had leapt over the sides.

Today's customers are more demanding than ever. When they call or e-mail an organization after failing to obtain the product or service sought online or overautomated voice they rightly require agents who are helpful and intelligent and who can meet their needs. So what happens to customers' satisfaction and loyalty when they get less-than-stellar agents? No prizes for guessing the answer here…you can read their reactions via social media sites.

If contact centers want to ride the next boom instead of drowning in it, they need to treat their employees well. For the rewards, in customer retention and sales and lowered total expenses, far outweigh the penny-wise/pound-foolish costs "savings." CIS

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