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## RightNow Takes U.S. Government To The Cloud

### Also In This Issue:

- Onshoring Versus Offshoring
- IT Support Prescriptions
- Communicating Through Disasters

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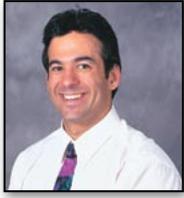
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Rich Tehrani, CEO, TMC



## How to Survive Change and a Turbulent Business Climate

I do my best to wish every TMC a team member a happy TMC anniversary. Last week I noticed that it was the anniversary of Nadji Tehrani, the company founder and chairman, my father, and the person who decided to start this company in 1972. Suddenly, it occurred to me that this was TMC's 38-year anniversary.

As I reminisced about the past decades, I thought it would be instructive to go over some of the lessons we have learned and that have kept us alive as markets and industries changed.

### The Customer is First

I am thankful that the TMC team has always been the most customer-friendly of any company we compete with based on comments we regularly receive from customers. We are far from perfect and we are constantly trying to improve but, to make it at TMC, you need to put the customer first. Customer should refer to other team-members as well – showing respect, courtesy and care for those people you work with and our end customers is what has allowed us to survive and thrive.

### Take Nothing for Granted

The list of competitors TMC has had these past decades is incredible. Often, we competed against companies considered impervious to competition. In the 1990s, we had a competitor with a massive trade show in Los Angeles, with which companies in the industry told me we could never compete.

At the beginning of this decade there was a very large trade show which we were told we could never compete with. Both of those shows are now gone as are COMDEX, Supercomm, CEBIT America, and dozens of others.

If you are on top today – consider yourself lucky – it is not a right or a gift. A new technology will wipe you out overnight if you are not aware of the changing business landscape.

### Speed

Fourteen years ago, a competitor told me, “We know there is no way TMC can compete with us because they are too slow.” “S\*\*t, he was right,” I thought. I didn't sleep that night. Instead, I came up with ways of transforming our company into not only a faster one, but the fastest. Within the next few years, we performed a slew of market-changing announcements and strategies that I found out later left our competition in the dust.

At one point in our past, we were alerted to the fact that a competitor was going to launch a new product, which we, too, were about to launch. We further knew we had a few weeks to saturate the universe with our product and message because the decision-maker for the opposing company decided to take two weeks off. When that individual returned, the decision was made that they were too late, and they cancelled their product launch shortly thereafter.

### Fail

If you aren't failing regularly, you are doing something very wrong. Launch, launch, launch and learn from your mistakes and be quick to change strategy. Streamline the launch process, so it costs as little as possible. Use brand extensions to test new techniques and business models. Yes, use your core and successful businesses to test new ideas and concepts. The world is filled with opportunity and the only way to know you are taking advantage of them is a track record of not only successes, but failures that can lead to other successes.

### Be Passionate

If you don't have passion for what you do, why do it? Life is too short. Technology has changed the way our business works, and with the advent of the Web, the best content is spread quickly and virally. The Internet allows us to entertain the most innate passion in all of us – the need for recognition and positive reinforcement.

### Work Harder

Every year, I find myself working harder and the companies that don't keep up are generally liquidated and employees left scrambling looking for new jobs with little notice. Obviously, hard work alone won't cut it – you can row as hard as you like but if your rudder is not pointing in the right direction, you are destined to crash and sink. Be sure your company is doing all of the above and, if needed, be the change agent to make these ideas a reality. If you do, you will likely be rewarded. If not, perhaps you are on the wrong boat - I mean team.

I asked our founder Nadji why he started this company and he went over the last 35-plus years in a few minutes. Perhaps the quote that moved me most was, “We wanted to be first and better than anybody else.”

Quite often, passion and enthusiasm disseminated from the top is the equivalent of hitting a tuning fork hard on a desk. Just as the vibrations feel as if they are more powerful as they descend down the fork, passion and enthusiasm spread throughout an organization can be even more powerful than the initial jolt of energy a company's founder injects into a team.

A passion for serving our customers well, being accessible, listening to constructive criticism and treating each other with courtesy and respect are a few of the reasons I believe we have made it through countless wars, bubbles and other business challenges.

On that note, thanks to the TMC readers, sponsors, advertisers, partners, conference attendees, vendors and team members who have helped us achieve this milestone. **CIS**

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Erik Linask, Group Editorial Director, TMC



## Consistent Information Means Consistent Satisfaction

There are many factors that go into good customer service, none of them secrets. Yet, all too often, the simple things fall by the wayside creating unsatisfied customers and additional work to repair ill will and retain the customers. Among the seemingly simplest strategies – yet one I find often is not practiced – is information consistency. Consider the difficulties that can arise when customers are provided different information regarding the same question or problem.

I was headed to the airport early one morning recently, when I stopped at a local branch of a national banking institution for some cash, only to have the ATM eat my card. Under normal circumstances, the situation would have been easily remedied by entering the branch and having a temporary new card issued and a permanent card mailed to my home – 4:45 a.m. is not normal circumstances.

So, upon the machine not giving up my card – nor did it offer up an opportunity to receive cash – I noticed a number to dial for security issues, and figured this was as good as any option at this point. It wasn't the correct number, but the agent was able to direct me to the right call center, where an agent, unfortunately, told me I was out of luck, that the machine would reboot on its own, but wouldn't return my card.

However, she was able to let me know that any of their branches in Chicago – anywhere in the country outside of California, in fact – would be able to issue me a new temporary card and have a permanent one mailed. In fact, I was told they would be able to overnight one to my hotel in Los Angeles for the next day. It was about as good a resolution as I could have hoped for, since there was a full-service branch less than one mile from the building to which I was headed.

I got the flight, believing by the time I reached the client's offices, my situation would be resolved.

Alas, when I arrived at the branch office just outside the Windy City, I was told that, because my account was not opened in the state of Illinois, all they could do was initiate the process to have a new one sent to me at home – not even overnight one to my hotel for the next day. This was much less convenient than what I had been originally told and, while I was able to get cash from the bank, it had me asking why there was such inconsistency in the details I received from two different agents.

Certainly one factor might be the agent on the phone did what she had to in order to get me off the phone with a positive outlook. While that was true, she did little to increase my

confidence in the bank's ability to resolve issues. On a broader level, it also brought me back to a conversation I had recently at [Interop](#) with Patrick Botz, director of marketing at VPI, regarding how critical consistency of communication can be, and how technology can be used to drive it across points of customer contact.

Specifically, analytics engines – certainly speech analytics, but even more importantly, desktop analytics – can provide valuable insight into drivers of FCR, customer satisfaction, and successful cross- and upselling. By tracking the applications agents access during interactions, words, data, and events can be tagged and categorized, and complex analytics engines can be leveraged to define patterns that result on both successful and unsuccessful interactions.

For instance, Botz explained that one VPI client was able to determine the six most successful tactics and turn them into a set of best practices to be followed by all agents, resulting in a significant increase in sales and customer satisfaction. In fact, he noted that the VPI's analytics capabilities are driving nearly every sale for the company currently.

By understanding which activities and language is most likely to result in positive customer interactions, businesses are able to create consistent messaging across their organizations for each scenario – and develop new best practices when new situations arise.

I'm not trying to fool myself into thinking my own situation could have necessarily been resolved differently than it eventually played out, but had I been provided accurate information at the outset, I would undoubtedly not have been left with such a negative impression of the competency of the customer support staff.

And that's what it's really about. No reasonable customer is going to expect that every situation can be immediately fully rectified, but they should have a reasonable expectation that the information they receive regarding resolution is going to be accurate. To me, that's as much a measure of quality customer service as anything. **CIS**



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## RightNow Takes U.S. Government to the Cloud

The Obama Administration has made it clear that it wants to “do more with less” i.e. maintaining and developing federal programs, such its economic stimulus package and health reform at lower total costs. Cloud computing is one such solution to government needs. This method greatly reduces capital and IT expenses over premise-based solutions while offering superior flexibility and scalability. That includes the ability to support teleworkers, which is also a White House priority and to enable business continuity during natural, and man-made-disasters; the recent attempted Times Square bombing is a stark reminder how real the threat of terrorism still is: nearly nine years after the Sept. 11, 2001 attacks.



Many – but not all – Federal government agencies have been getting the message about the cloud and are reaping the results. A recent Brookings Governance study, “Saving Money Through Cloud Computing,” found that “agencies generally saw between 25 and 50 percent savings in moving to the cloud. For the federal government as a whole, this translates into billions in cost savings.”

Among these solutions federal agencies have been adopting is RightNow Technologies’ ([www.rightnow.com](http://www.rightnow.com)) Secure Government Cloud. Launched in April 2009, it runs the RightNow CX customer experience suite, which helps agencies optimize constituent interactions via the web, contact centers and social networks. Over 170 government agencies worldwide, including the Department of Homeland Security Customs and Border Protection and USDA Farm Service Agency, already use RightNow’s Secure Government Cloud solutions.

The Secure Government Cloud is also being tapped by 31 state agencies and offices. They have been taking the brunt of the economic downturn with dramatically reduced sales taxes and other income sources, forcing them to make cuts in services, like transit, even as federal stimulus dollars flow into building new and extending existing bus and rail transit networks.

Yet RightNow says even more billions of dollars can be squeezed out of budgets if other government agencies signed up for the Secure Government Cloud. And to encourage more federal (and state agencies) to take flight, the firm introduced in April 2010, Safe Switch, a new program that assists them with flying up to the cloud.

RightNow points to MeriTalk’s 2009 study “DIY Federal IT Bailout: Finding Funds,” which points out that the federal government could save an estimated \$6.6 billion with cloud computing. And adds Brookings: “With the number of federal data centers having skyrocketed from 493 to 1,200 over the past decade (Federal Communications Commission, 2010), it is time to more seriously consider whether money can be saved through greater reliance on cloud computing.”

Kevin Paschuck, RightNow vice president of public sector, estimates that 80 percent of federal government information, such as its websites and data such as the number of non-U.S. citizens entering the country, can be hosted in the Secure Government Cloud as they meet the government’s low and medium security classifications. High security material, such as classified documents and military command and control instructions, he says, should never go into the cloud.

The departmental cost benefits of flying to the cloud are significant. While RightNow could not provide at press time any examples showing hard money savings for federal agencies, it pointed to the experience of the Colorado Department of Revenue (CDOR). From February and mid-March of every year, CDOR may have to field 90 percent of its annual workload from its more than 2.1 million individual income tax filers. It saved approximately \$700,000 over an 18-month period with the RightNow CX self-service and knowledgebase capabilities, which are hosted in the Secure Government Cloud.

The Secure Government Cloud also provides agencies with unprecedented deployment and operational flexibility. It is multi-tenant and multi-version, unlike, RightNow says, the

# Helping Customers Get Answers

## Multi-Channel Self-Service



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offerings from other cloud vendors. This enables compliance with government upgrade requirements for agencies to upgrade on their own schedule, not on the vendors’.

Yet federal agencies have been reluctant to embrace cloud computing, says RightNow, because of strict security and compliance standards that are required to not house sensitive information on premise. Some agencies also want to physically see the data centers for a sense of control and view it as an additional means of risk management.

**“RightNow is assisting agencies currently running on-premise, stove-piped legacy applications to seamlessly transition into a modern C&A-compliant cloud environment.”**

**– Greg Gianforte, founder and CEO of RightNow**

“RightNow utilizes best in class technology and processes to ensure our customers have confidence in our mission critical cloud computing environment,” said Laef Olson, chief information officer at RightNow. “We take our obligation to provide a comprehensive risk management service very seriously.”

RightNow CX has been written to meet stringent federally-required certification and accreditation (C&A) standards. These include compliance with FISMA, HIPAA, NIST 800-53 FIPS 199, PCI and SAS70 Type II with complete NIST C&A documentation including Infrastructure SSP, Applications SSP, SAR, Risk Assessment Report and POA&M. The Secure Government Cloud is DIACAP-certified for organizations that must run on the NIPRNET. RightNow follows the same NIST and DIACAP security standards and frameworks that an agency would use to secure their systems: at no extra charge.

RightNow has partnered with the Defense Information Systems Agency for a Secure Government Cloud offering that has been customized for the Department of Defense (DoD). Agencies such as the U.S. Army and U.S. Air Force can now operate RightNowCX on the DoD’s DIACAP network to help with case management and HR services. The hosted servers are located at DoD locations for additional security.

More DoD agencies have are moving to the highly-secure cloud. Among them: the Medical Education and Training Campus (METC). RightNow CX helps the healthcare education campus train and support medics enlisted in the Air Force, Army and Navy.

“The RightNow Government Cloud is highly secure and DoD compliant,” says Major Manny Dominguez, Ph.D., USAF, chief information officer, METC. “METC is paving the way for other DoD organizations to use cutting-edge technology without investing significant budget and IT resources.”

To add steel to the security RightNow’s servers are staffed 7/24/365 by DoD-cleared personnel for security, operations, and customer care. The firm has well-hardened locations with multiple security and data and power backup layers.

RightNow rolled out the Secure Government Cloud after certifying the application to government-mandated standards. Paschuck said that his firm already had 70 percent of federal agencies as clients but they were using CX at a low level, which comprises only 10 percent of the information; mid-level contains the remaining 70 percent that is cloud-feasible.

“Our federal agency clients said ‘we see the benefits of going to the cloud; if you can get us there and overcome the security obstacles, we’ll move,’ says Paschuck. “In order to do that we needed to meet the federal government security requirements: their primary objection for not going to the cloud.”

RightNow’s new Safe Switch program greatly lessens the risk of falling off the cloud with features including:

- Rapid deployment at a fixed price. This migrates existing on-premise applications to the RightNow Secure Government Cloud with an average “go live” of less than 90 days. RightNow will agree to fixed-price milestone based contracts and with no payment required until each milestone is met to the agencies’ satisfaction
- Price matching. RightNow will match an agency’s existing on-premise solution maintenance fees for the first year so agencies can switch to the cloud within their current budgets and realize IT infrastructure cost savings in year one. RightNow also provides guaranteed pricing for the five years following

Safe Switch frees agencies from the constraints of typical software agreements with annual usage alignments, up or down. It also puts an end to “shelfware” i.e. purchased but little used (and money wasted) software, allowing agencies to rebalance usage up or down annually to meet their needs. The RightNow program also provides agencies with an annual pool of usage over a 12-month period, which accommodates seasonality and fluctuations in their operations without paying extra for spikes. And if RightNow falls short of the service levels guaranteed in a client’s customer care package, it will refund a percentage of the client’s subscription fees.

RightNow has extensive cloud implementation experience both for its customers and internally. It began offering cloud-based deployments alongside its premise-based products in 2003 then became cloud-only in 2007.

“RightNow Safe Switch provides agencies with a way to seamlessly transition into a secure government cloud that meets stringent security requirements, provides high levels of application control, eliminates shelfware, and guarantees fast deployments and price matching,” says Paschuck. “The program helps agencies take the risk out of quickly moving to the cloud, which is what they have been looking for.”

“RightNow is assisting agencies currently running on-premise, stove-piped legacy applications to seamlessly transition into a modern C&A compliant cloud environment,” says Greg Gianforte, founder and CEO of RightNow. “RightNow with the Safe Switch program is the only vendor that can help agencies leverage secure solutions to improve constituents’ Web, contact center, and social experiences in a government cloud today.” **CIS**

# The Exceptional Customer Experience: It's All About the Process

**E**ffective business processes are essential to providing a positive customer experience in nearly any business. So why do such processes often fall short, and why do companies continually incorporate them if they're "broken"?

Whatever the reasons – mergers and acquisitions, ineffective technologies, departmental divides – customers don't really care how a company's processes go wrong.

## How do dysfunctional processes impact a business?

**Internal impacts** – employees. A fair salary, flex hours, work location, etc. all contribute to employee satisfaction. But employees are impacted far more by job stress and frustration, much of which can be attributed to inefficient organizational workflows and procedures.

**Internal impacts** – departmental mentality vs. "We're part of the same team." This mindset is usually the result of conflicting processes and workflows throughout the organization, and of significant communication gaps within the enterprise.

**Customer impacts.** A customer's perception is everything. When service is superior, customers are influenced to do business with a company again and spread a good word to others. When service is unacceptable, however, customers will go elsewhere.

**Cost impacts.** Obvious or subtle, there is a decided cost to dysfunctional processes in the way they negatively affect revenue opportunities, customer satisfaction, employee satisfaction, staffing, and even in terms of cash flow or compliance issues.

## How do companies attempt to fix problems, and why do they fail?

The only way to resolve process and workflow problems is to address the root cause, which usually falls into one of the following categories:

**The "Band-Aid" approach.** Don't worry about what's causing a problem, just treat the "symptoms."

## The "Patchwork Quilt" approach.

Many processes involve multiple departments, and departments often work within their own silos to resolve process issues without considering the impact on other areas.

**The "Tunnel Vision" approach.** Though the cause of a problem is internal, don't forget the customer's point of view.

## How and where do we start to fix the issues?

1. Establish a cross-sectional team of internal stakeholders, including consultants or other specialists.
2. Initiate team-oriented whiteboard sessions to identify key process and workflow issues; include customer feedback.
3. Develop a plan to prioritize process issues and a timetable for completion; identify cross-departmental impacts.
4. Organize a "fix" team to address each prioritized process/workflow, including front-line employees, persons involved in intersecting processes/workflows, and decision makers who can help work through organizational barriers.

For "fix" team members, it's critical to follow a defined methodology that allows them to likewise define, document, and address the root causes of a dysfunctional process, identify its organizational impact, analyze options and technologies for an improved process, and implement change.

## Where the "right" technology comes in

In conjunction with business processes, automation used to mean eliminating people and "doing more with less." However, the new thinking behind

business process automation is to actually involve the people who perform the tasks within a process – to make them more proficient at what they do and effectively improve work flows.

To that end, communications-based process automation (CBPA) is a new technology approach based on automation practices used in contact centers since the mid-1990s. With CBPA, technologies such as intelligent routing and queuing, presence, recording, and real-time monitoring and tracking make processes more precise and less susceptible to breakdowns. More specifically, companies can:

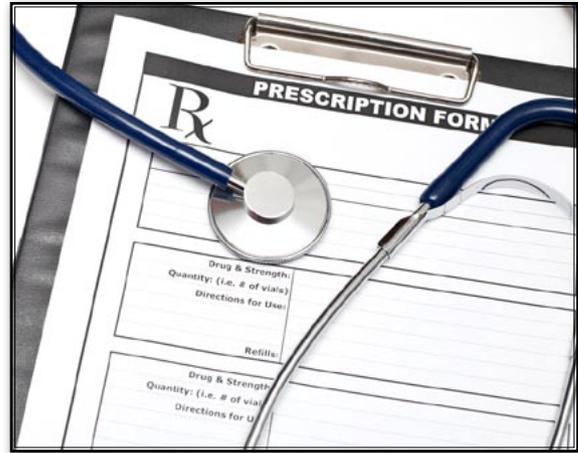
- Automate processes end to end and seamlessly incorporate communications such as e-mail and Web services associated with those processes.
- Enable employees to participate in a business process from any department or office location.
- Predictably and flexibly distribute work to an available employee with the right skills, and with the necessary service levels.
- Visibly track work pipelines via real-time monitoring of process activity.
- Capture and track work, as well as customer dialog, that are part of a business process.
- Continually improve a process using resources within the CBPA application to model, modify and manage the process, and to support additional employees as more processes are automated.

Admittedly, fixing a business process that's "broken" is a process in itself. With the proper approach to identifying root causes and determining where and how to begin addressing process issues, including using technologies such as CBPA, your business can create a culture of sustainable process improvement. **CIS**



## Prescriptions for Support

Help or IT support desks are organizations' including contact centers' "IT emergency wards", providing quick, timely and accurate diagnoses, fixes, patch ups, prescriptions and referrals to keep them going and productive. Yet they are "cost centers"; they have no opportunities to drive in revenues unlike many customer-facing service and external tech support desks. They are therefore under pressure to keep expenses down.



Juggling rising demand and limited resources can therefore create big headaches. The issue then becomes: how does one effectively and economically "support the support?"

Fortunately there is an increasing array of helpful and sophisticated prescriptions that provide quality affordable and high ROI assistance to IT support desks. Helping the helpers will enable them to help their organizations' operations, leading to greater customer satisfaction and income, lower total costs and greater net returns.

### Better Support, Lower Costs

Available over-the-counter to IT departments are new solutions that aid in resolving issues including improved and more accurate communications with users.

Numara Software is enabling support reps to be more productive with Numara FootPrints 9.5 service desk management solution. It features a home screen and customizable toolbar with a layout that provides easy access to the most frequently used options, permitting quicker issue resolution. It also has easy-to-access icons, varied font colors to highlight priorities and in-line editing. These components, says the company, shaves minutes off tasks reps perform most frequently, such as updating tickets and monitoring hot issues.

The IT Infrastructure Library (ITIL) Version 3 (v3) Service Catalog Management enables IT support desks to publish to user organizations and staff, such as contact centers and agents, access to online, well organized and easy-to-navigate menus of services offered via service catalogs, explains Riaz Mohammed, director of sales and marketing, Monitor 24-7. These service catalogs organize and display all services with easy-to-under-

stand descriptions, browsing and search capabilities. They provide single access points for all of organizations' service delivery needs. The catalogs allow IT departments to enforce repeatable and measurable service delivery processes.

Monitor 24-7 has just come out with IncidentMonitor, Version 9 (v9) that it says is in line with the firm's continued commitment to ITIL standards; the solution has achieved PinkVERIFY certification for 10 ITIL v3 processes. PinkVERIFY objectively assesses a software tool's enabling applications against ITIL definitions and workflow requirements. IncidentMonitor v9 allow users to search their service catalog, view all service details and submit requests for services. This view allows the business access to services they are authorized to request.

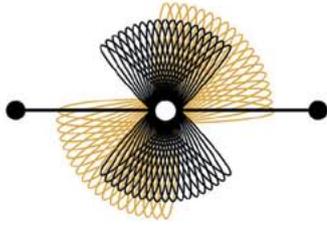
IncidentMonitor's service catalog functionality provides the business with an entitlement-based view of all services. For example, a manager can submit a request to initiate the new hire process. They will be presented with an electronic, security-controlled form which will capture all required information to deliver the service right at the request submission. All other users will have access to services such as requesting a new laptop and password resets.

IncidentMonitor v9 has many other features that support ITIL v3 processes. There is change management, release and deployment management and service asset and configuration management integration which allows organizations to efficiently oversee strategic and tactical IT services. For other services such as enterprise resource planning or ERP the underlying infrastructure – hardware, software, interfaces – that support them is documented and viewable by the IT support staff. Any infrastructure changes results in the creation of a new version of the service with full audit and history details available to the IT support staff. The IT support

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personnel also know what users have which product variations so that they can assist them accordingly. The net result is consistency and repeatability that reduces downtime and ensuring smooth rollouts says Monitor 24-7.

IncidentMonitor v9 also offers knowledge processing by which the software enables capturing, vetting, approving and publishing phone-based and field support reps' knowledge, and when done so making it available to other reps, plus users via self-service. This feature facilitates issue resolution to company-unique circumstances and applications. An archiving function enables future support for hardware and software that is no longer currently used and/or supported by their manufacturers but is there just in case a unit or program shows up.

"What is a company's greatest asset with regards to internal support?" asks Mohammed. "It is what is in your technician's head. IncidentMonitor Version 9 makes that available through a systematic process to ensure accuracy to other techs who come across a similar issue and to end users to help them solve their own issues."

Managing any service requires accuracy throughout the entire process, starting with documenting every event from its opening until their resolution. Yet when using phone and e-mail for support there are risks that key information will not be entered correctly or in their entirety, which means the recommended solutions may not fix or make the problems worse. These techniques also add to service costs because they require time-consuming manual data entry.

SysAid has come out with an alternative to both voice and e-mail in its SysAid IT 6.5 and its most recent 7.0 releases: live chat. This mode enables IT administrators to communicate in real-time with end-users, providing them with the ability to conduct several different chats simultaneously, while monitoring the users' IT assets at the same time.

SysAid allows looking up all of the users' recent requests as well as similar inquiries, and how they were solved for them and others into a knowledge base built into the application. Chat conversations are entered into existing or new service requests along with all of the details. By having end-users utilize one of SysAid's several automated processes for submitting requests, organizations can reduce each submission length by an average of 60 seconds as compared to manual entry by the IT teams.

### Improved Issue/Request Tracking and Asset Management

To help organizations help other users there are new and enhanced solutions that track incidents and user requests, changes and problems and manage assets. TechExcel's Service 8.5 and its companion product for external support, CustomerWise 8.5, include APIs for managing knowledge and asset information, incident time-tracking and time roll-up, administration reports, customer surveys and web forms, incident linking for e-mail and automatic closure options and software asset management. There are also improved e-mail notification settings.

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TechExcel also offers an updated project planning tool, TechExcel ProjectPlan, that provides integrated project planning and resource management for IT managers and service teams. ProjectPlan gives managers complete control over project information, scheduling and resource management through its real-time integration.

One growing issue is with supporting home-based and mobile and field staff and ensuring that their computers keep up to date, secure and to the same standards as those in the rest of the organization; they do not have help desk reps that can readily walk over and get inside their devices. Numara Software provides the next best option. The Numara Asset Management Platform can deploy intelligent software agents onto the remote users' PCs, thereby permitting these devices to be as secure and compliant with IT standards as those at employers' premises. This feature enables IT staff to monitor, patch, push software and remote control to any machine anywhere.

"Having someone in the office makes it easy to solve their Outlook issues, but the problem becomes more challenging when they are not in the office," explains Umesh Shah, senior manager, product marketing, Numara Software. "Break fix is just one issue, ensuring the remote device is just as secure and compliant with IT standards as an in-house PC is also a concern. How do you ensure a remote user doesn't install software on their machine which could introduce a virus to the company network?"

### Self-Solving

The best IT support solution is often one that enables end-users such as contact center agents to fix their own problems. These include internal online and downloadable FAQs and intelligent search applications. This is multi-win by reducing help desk costs, getting users back up and running ASAP, which improve their productivity and ultimately end-customer satisfaction. For home-based agents and mobile staff, such tools are not support alternatives but are the first-at-hand methods.

FrontRange's HEAT Self-Service module allows IT support departments to run issue templates, making it quick and easy for users to request routine services. It also has a banner feature for internal support site screens that rapidly advises users of high profile issues such as software glitches; users can choose to "subscribe" for updates to particular issues.

RightAnswers' RightAnswers Enterprise Gateway, an add-on component to its Unified Knowledge Suite provides a bridge, or gateway, between a firm's search system, the RightAnswers solution and their help desk system. It gives end-users a single source to find answers by leveraging the existing enterprise search system. It also permits content created by the IT support team can be made available to internal or externally-accessed search engines.

With RightAnswers, users see results in a solution view which is enriched with features from the self-service portal such as "See Related Solution" and "See Other Users' Solutions" portlets and feedback buttons. They have quick access to relevant information and to links to the service incident management system and have a central repository for their search needs. RightAnswers' Enterprise Gateway accomplishes this by converting unstructured content into structured metadata-driven solutions.

### Remote Access

Remote access is the "expressway of IT support", delivering information, instructions, and downloadable solutions. It enables reps to get inside hardware and software to diagnose and fix problems. The method also ensures user compliance with IT policies including security. With more employees, including contact center agents working from home, remote access becomes even more critical in keeping operations going and safe and with more organizations centralizing their help desks; the nearest tech may be tens if not hundreds or thousands of miles away.

LogMeIn, whose solutions enables remote control, file sharing, systems management, data backup, business collaboration and on-demand, has bolstered them by supporting Intel's Remote PC Assist Technology (RPAT), powered Intel's new vPro Technology. It is now standard in the LogMeIn Pro<sup>2</sup> product.

With LogMeIn and RPAT, IT help desks via their organizations' managed service providers (MSPs) can access, support, and manage home, mobile and remote computers via the Internet – even if their computers are turned off or if the operating systems (OS) are unavailable from hardware or software failure. IT support reps can power on the devices, eliminating the need for users to leave their machines on or in sleep mode to receive critical up-

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dates or perform back-ups. Support reps can access remote units at the BIOS level in the event of an OS or hard-drive failure that often accompanies the infamous blue screen of death.

Research by Intel confirms that support issues which remain irresolvable in the OS account for approximately 46 percent of support costs. LogMeIn, when used with Intel RPAT, enables MSPs to address many of these issues without a truck-roll or equipment return.

Intel RPAT enables connections to the Internet through an encrypted connectivity gateway. Upon the end-users' acceptance, an encrypted, private connection is created with a trusted MSP using ISV (independent software vendor) tools that are integrated with the service. LogMeIn and RTAP work with both landline and wireless Internet connections.

One critical issue that arises with remote access is the lack of effective means of tracking remote support, which is typically point to point reports Nathan McNeill, vice president-product strategy and co-founder of Bomgar. IT departments often have no information as to the interaction duration, what was accessed, what tasks the reps carried out on users' machines and how successful were the fixes.

"What you typically have in remote access is a piece of software on one end a piece of software on the other and nothing in between," McNeill points out. "You get hundreds of support interactions going on all day in larger organizations. Yet from a management perspective there's no record of these interactions ever taking place. Without these records to explain what happened during the remote support session you don't have a good answer for your corporate auditors when they analyze your support functions."

McNeill's firm makes the "Bomgar Box": an appliance loaded with specialized software that is attached to a company's web server, at its DMZ, sitting between the support desks and users, that tracks interactions including enabling supervisors to see if the fixes were correctly done. The unit is owned and hosted by Bomgar customers. This avoids, he says, the thorny legal issues that can arise with SaaS-based solutions where support session details (including any sensitive data accessed by the reps) are routed through external offsite systems: as opposed to being housed and secured internally.

McNeill finds the appliance approach superior to software-only because it avoids competing with other demands on his customers' servers and allows for faster troubleshooting. The appliance model also permits Bomgar to speed product development, as demonstrated with the company recently releasing its newest offering, the B400. The B400 supports up to 6,000 managed remote desktops, up from 1,200 in the B300 that had required support organizations that needed more capacity, such as large IT outsourcers, to maintain multiple appliances.

"We're finding that more organizations are switching to appliance-based remote management to supervise point to point remote access of systems and that is what is driving the need for larger appliances," says McNeill. "This is especially a concern for enterprises operating in heavily regulated industries, such as the financial and healthcare sectors."

## Sophisticated Solutions, Sophisticated Support

There are new, sophisticated and bandwidth-intensive tools among them CRM, unified communications (UC) and workforce optimization in contact centers and across enterprises that require careful management and quality support, and suppliers are responding.

Psytechnics' Experience Manager 5 with Service Desk ensures UC voice and video quality and rapid issue response by combining quality of experience data with call detail records with fault descriptions generated in plain English for quicker action by IT support teams. It identifies problems such as packet loss, jitter and latency. It also marks the applications' performance, including voice/audio issues such as echo, noise, distortion, delay, and incorrect speech levels and video issues such as compression, image-size, frame rate and video image quality. In doing so the Psytechnics solution removes having to scale IT support for new UC-based services while slicing call quality incidents by up to 80 percent.

The sophisticated tools are also adding to the already-complex contact center agents' desktops, whether support issues from glitches or slow performance from the hardware or software, the application interfaces or by how agents are using them. Lori Wizdo, vice president-marketing Knoa Software says her firm frequently encounters more than 25 applications accessible through agents' computers.

The costs of these issues, such as slow or faulty applications add up. For example a consumer services company which implemented Knoa's Experience and Performance Manager (EPM) performance monitoring technology discovered that cumbersome application interfaces were contributing 20 seconds to a 250 second average handle time.

Knoa EPM 5.5 can help contact centers handle these issues. Dynamic baselining identifies instances where performance is trending downwards. IT operations teams can then take action before service level thresholds have been breached and business has been disrupted. Multi-dimensional drill-down capabilities identify cause-and-effect relationships that might otherwise go undetected.

"Complex systems are hard to install, costly to maintain and difficult to use," says Wizdo. "I don't believe that we can engineer that out of the contact center business systems. One approach to managing the risks is to leverage top-notch application management tools to identify the problems, rapidly identify the root causes and quickly implement the remediation." **CIS**

The following companies participated in the preparation of this article:

**Bomgar**  
www.bomgar.com

**FrontRange**  
www.frontrange.com

**Knoa**  
www.knoa.com

**LogMeIn**  
www.logmein.com

**Monitor 24-7**  
www.monitor24-7.com

**Numara Software**  
www.numarasoftware.com

**Psytechnics**  
www.psytechnics.com

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**Aspect** ([www.aspect.com](http://www.aspect.com)) has released Aspect Unified IP 6.6 along with an enhanced version of Aspect's Advanced List Management solution. The new functionality includes increased 'Ask an Expert' capabilities that leverage Microsoft Office Communications Server 2007 R2 to allow contact center agents to search for, identify and connect to subject matter experts. There are improved outbound functionalities via tighter integration with Advanced List Management and better pacing, stronger network resiliency and a new auto-synch function. There is false positive accounting and reporting for Ofcom regulatory compliance in the Unified Kingdom. There is also more effective archiving, tightened security and encryption, plus support for outbound recording in multiple locations. Aspect Unified IP 6.6 Enhanced also has a starter kit that uses default configuration data, push-install that automates deployments in distributed environments and a deployment wizard tracks the install throughout the entire process

**Fonality** ([www.fonality.com](http://www.fonality.com)) has partnered with **SugarCRM** ([www.sugarcrm.com](http://www.sugarcrm.com)) to provide Sugar customers with a two-level contact center routing solution, integrated with their CRM applications. A Basic Connector enables core capabilities such as screen pops and click-to-call using the Fonality phone system from the SugarCRM web interface. An Advanced Connector, based on Fonality's PBXtra Unified Agent Edition, provides contact center capabilities including automatic call data tracking and recording, viewing call histories, determining lead calls to sales conversion rates and instant reporting of leads not called within specified periods. Fonality's Connector avoids entering call information or attaching recorded calls to SugarCRM

**IBM** ([www.ibm.com](http://www.ibm.com)) is offering a new service that advanced analytics to match a caller with the optimal contact center agent in real-time. It has collaborated with Assurant Solutions ([www.assurantsolutions.com](http://www.assurantsolutions.com))

to develop the Real-Time Analytics Matching Platform (RAMP). RAMP combines data about individual customers with each contact center agents' specific skills, expertise and past performance. IBM Global Business Services consultants designed a "matching-engine" based on this that provides individual-level decisioning and call assignments. The engine assigns callers to the optimal agents and routes calls in real-time to those staffers. It also tracks each call assignment and makes adjustments if a call ends before or after its predicted time

**OAISYS** ([www.oaisys.com](http://www.oaisys.com)) has unveiled the 6.1 versions of its Talkument personal voice documentation and collaboration software and Tracer call recording solutions. There is integration with SIP trunk recording and soon expanded call data capture capabilities to include details from the communications platform in addition to the SIP trunk data. Contact centers can export call recordings based on pre-defined business rules, using criteria such as call duration or agent ID into speech analytics applications. There is on-demand software licensing that enables cost-effective random sampling of communications. Talkument and Tracer are also now multilingual with support for Spanish and Portuguese languages

**Pegasystems** ([www.pegasystems.com](http://www.pegasystems.com)) has acquired CRM firm Chordiant Software. The product lines obtained including the new Chordiant Cx Outbound. It enables firms to use a common set of customer strategies to systematically determine the best next action for a customer regardless of the direction of the communication and the channel. The new solution, combined with other capabilities, provides self-learning, thereby permitting a continually adapting and complete picture of every customer communication. With the acquisition Chordiant clients can incorporate Pegasystems intent-driven process automation in their existing foundation and marketing solutions. Pegasystems' clients can in turn readily employ Chordiant's predictive decision management solutions, plus its extensive CRM assets, and expertise

**PeriscopeIQ** ([www.periscopeiq.com](http://www.periscopeiq.com)) has launched a new suite of solutions among them:

- PeriscopeIQ's customer feedback solution with PeriscopeCEVA. This feature distills customer feedback into meaningful metrics, with specific, actionable issues that delivers business intelligence
- PeriscopeIQ's employee feedback solutions which include PeriscopeOCS. It identifies the ethos of organizations by measuring all aspects of corporate culture—employee engagement, organizational strengths, weaknesses and company values



and beliefs—to help enhance corporate performance. It also includes Periscope360 that evaluates and provides assessments and ratings of employee performance through individual feedback, automates relationship and data integrity, creates competency maps and offers query capabilities. There is also PeriscopeTNES that measures skills profiles and training needs through employee and supervisor feedback

– PeriscopeIQ’s compensation management solutions include PeriscopeCOMP that aligns compensation strategies with employee expectations and provides critical insight into how they impact morale, productivity and employee retention. It also has in its cache PeriscopeCODA that enables organizations to instantly offer survey participants access to the entire compensation survey dataset online

**SugarCRM (www.sugarcrm.com)** has sweetened its open-sourced product with the new Sugar 6 that has several key features:

– Upon entering the application, users are welcomed with revamped guided User Setup wizards. There is a Sugar Shortcut Bar, a persistent toolbar throughout Sugar 6 that allows common tasks to be performed in one click, including creating an account, contact, sales opportunity, document, note, task or logging a meeting or call. Included in the Shortcut Bar is a context-aware Global Search field which filters search results based on the module in use (e.g. Contacts, Opportunities and Accounts) and produces results without leaving the page

– New buttons and icons that allow users to perform tasks more easily while increasing the information density of each screen. There are also module menus that show users where they are in the application as well as providing information about previously viewed pages, filtered results based on their permissions and tab naming

– Native application support for leading smartphone operating systems, including for the iPhone, Android and BlackBerry

– SugarCRM’s Cloud Connectors to third-party data service providers by default, al-

lowing users to obtain account and lead information directly within the application. Sugar Plug-Ins for Microsoft Outlook, Word and Excel are also built-in

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## Which Shore to Land On?

If contact center decision makers or their clients seem a little undecided as to where to land their new centers or programs they have good reason to be. The factors affecting site selection and outsourcing have become much more complex. Access to Spanish-speaking agents; union, public image and political considerations; and cultural affinity, agent performance and customer retention issues now reside with labor cost, compliance and telecommunications considerations.



To get some directions we approached a leading expert and several top BPO firms. We posed them questions on:

- General onshoring versus offshoring trends
- Offshore and nearshore location shifts, including serving these nations' domestic markets
- Home agent options, i.e. "Homeshoring"
- Self-service alternatives or "Roboshoring"

### Sitel ([www.sitel.com](http://www.sitel.com))

Andrew Kokes, Vice President, Marketing  
Sitel sees offshore outsourced agent positions growing substantially over the next few years due to the advantages offshoring brings in terms of price, workforce scalability and quality.

Sitel has seen three main drivers for onshore contact center delivery in the U.S. The first is ongoing client need to transform fixed costs into variable costs by replacing capital expenses and fixed labor with operational expenses aligned to customer demand. Second, there has been an emergence of growth in vertical industries that have not traditionally outsourced, such as mid-cap healthcare companies. Lastly, there is a continued focus on innovation, with the outsourcer as a platform for expansion and flexibility (e.g. home-based agent program, automation, communication channel evolution).

Several factors could inhibit the delivery of onshore contact center services in the U.S. due to the slow climb out of the recession. The biggest is that companies can reduce their operating expenses by 30 percent to 40 percent by considering non-domestic options.

For example, India is the world leader in graduating English language engineering students. This translates into a very analytical talent pool capable of troubleshooting, identifying operational

efficiencies and driving continuous improvement. Select Latin American locations [can] tap into pools of talent that have a high degree of familiarity with North American culture and lifestyle. Latin Americans tend to have a high degree of customer empathy and often share a bilingual capability.

Moreover, by sourcing on a global basis, companies can mitigate risk more effectively by implementing a mix of locations: domestic, nearshore and offshore, including home-based agents.

In the past, India, the Philippines and Eastern Europe have been the most typical outsourcing locations. Two things have changed. First, there has been saturation in those markets, particularly in their big cities. Second, there is a desire among other countries to play in this arena because of the success of places like India and the Philippines. They see an opportunity to develop their economies by servicing non-domestic clients and pulling in foreign investment. Most recently, Sitel has seen a lot of growth in Central and South America, specifically in Panama and Nicaragua.

The largest opportunity for Canada remains with developing domestic sourcing solutions for Canadian businesses.

While Sitel HomeShore is a good fit for clients needing flexibility with peaks and valleys of call volume fluctuations, we anticipate HomeShore will remain a minority percentage of our total agent population. This is due largely to the fact that many client programs are simply too challenging to conduct from home. For example, clients requiring intensive, frequent hands on training, such as hardware-related calls would not benefit from the HomeShore model.

However, with sophisticated new eTraining solutions such as those offered by inContact, companies can more quickly and efficiently provide on-demand training to the company's home-based customer care agents. With RightTime technology



through eLearning from inContact, Sitel is providing custom training curricula to agents' desktops during dips in call volumes to further improve their soft skills, product knowledge and productivity and eliminate unnecessary training down time. By utilizing technology that ensures the delivery of continuous employee training and communications, more companies could successfully move towards the HomeShore model.

Automation should continue to grab an increasing percentage of simple transactions where human resource talent cannot add measurable value. Moreover, we believe the largest percentage of calls that cannot ultimately lead to an opportunity to enhance the customer relationship through up-sales or cross-sales offers will be driven to some form of automation or online self service.

### **Stream Global Services ([www.stream.com](http://www.stream.com))**

Karen Falcone, Vice President of Global Marketing

As the economy begins to recover, Stream believes companies will seek to partner with best-of-breed, experienced outsource providers that can offer the global scale, processes and technologies to deliver support solutions from multiple destinations including onshore, nearshore and offshore locations. Selecting the appropriate mix of service delivery destinations depends largely on the complexity and overall goal of the company's customer support strategy. In general, high-value and complex customer interactions [will] remain onshore or nearshore, while high-volume work with standardized processes is moved offshore to help reduce support costs.

Key offshore/nearshore locations for customer care include the Philippines and Caribbean and Latin America due to neutral accents and cultural affinity. In addition, each of these regions offers strong customer service, sales and technical skill sets. India is seen as a strong source for non voice-related customer care offerings. Back office and non-voice services including chat and e-mail are often delivered from this location. The Philippines are also becoming an attractive location for these services.

Stream sees a trend in domestic outsourcing in certain European markets. We are currently experiencing this shift in Canada and we are in the process of evaluating new country locations in emerging markets.

While Stream's Canadian operations may have been impacted as a result of currency fluctuations, our facilities remain at almost full capacity. This is a result of new client wins with leading regional companies that require in-country support.

While homeshoring provides a flexible and cost-efficient domestic delivery solution for many companies, typically BPO providers will integrate their at-home channel into their overall delivery model including onshore, offshore and nearshore brick-and-mortar centers to provide the best possible blend of support for their clients. Generally the type of support delivered from at-home agents involves structured programs such as customer care, order taking and sales with well-defined processes and set goals. Bricks-and-mortar facilities, on the

other hand, continue to attract clients due to the strong teamwork, face-to-face interaction and customer-centric culture that take place creating a positive environment where agents are motivated to succeed.

As client demand increases for outsource providers to drive down costs, improve utilization of resources, offer improved quality of customer service, and align with changes in work-life balance we believe this [homeshoring] business model of customer care will expand and require more outsourcers to implement these more flexible, workforce capabilities.

While automated solutions have improved and offer a cost-effective alternative support solution for many companies, they are typically used for simple customer transactions. Like homeshoring, we envision "robo-shoring" as an integral part of a company's global outsourcing strategy as they continue to seek innovative ways to further enhance cost savings and create new revenue opportunities.

### **Ovum ([www.ovum.com](http://www.ovum.com))**

Peter Ryan, Lead Analyst

With the onset of the recession there was a strong push to keep or move offshored work onshore. This was coming from the politicians in U.S., Canada and in the European Union to retain and grow jobs in their countries. There was also the factor that many companies took advantage of stable price points for wages/benefits and property costs and these allowed many of them to stay onshore for relatively affordable costs.

This situation is now changing very quickly as the economy begins to grow again. Companies are not going to find the attractiveness with onshore that they did in late 2008 and early 2009. One reason is that onshore contact center turnover, which has traditionally been high, is going to increase, raising costs and leading to poorer quality service. One cause for this is that in the recession many highly educated and qualified people that were laid off from other lines of work, such as finance, healthcare and travel had found jobs as contact center agents. Yet as openings in these individuals' fields increase they are going to return to them. That's going to put more pressure on contact centers to retain people.

Making contact center hiring and retention more difficult in a stronger economy is that contact center work is not perceived in North America especially as a career job, even though many people have developed very successful careers starting out as contact center agents. Also when you get a regional hub where there are a lot of contact centers close together the agents start networking and they figure out quite fast which employers have the better salary and benefits package. They won't hesitate to leave one center for another.

In contrast, the nearshore, mainly Latin America countries such as Colombia, El Salvador, Guatemala and Nicaragua is going to become ever more popular as before the recession: contact center expansion there never really did slow down.



A major driver is the need to support the expanding U.S. Spanish-speaking population. The last U.S. Census reports it is at 15 percent and this growth is likely to continue.

There is a propensity to have more complex, such as cross-sell/upselling and commercially important calls and those requiring compliance with strict regulations handled on-shore while the lower-valued less regulated calls answered or made offshore. Basic level customer care calls are more than likely to go offshore.

Tech support can go either way. There is a lot of great tech work that is being done offshore. There are also a lot of firms that are trying to differentiate themselves on the basis of using support at home.

There has been a lot of publicity about companies moving contact centers back to the U.S. in response to quality issues but in reality it is not large of an issue or in the number of jobs actually brought back as many people would think. What doesn't get attention is the ongoing numbers of workstations that continue to be set up offshore. BPO firms are figuring out their costs, cultural factors and comfort levels and that of their clients in where to go.

The [Latin American] nearshore is coming onto its own because their price points are as low if not lower than India or the Philippines and then they have the language skills to serve the U.S. Hispanic market. Many companies are therefore desperate to show loyalty to their end-user base by serving them in Spanish as well as English.

We're still seeing a fair number of workstations being sent to India and the Philippines. Yet more the latter than the former, though India remains attractive for a lot of different companies.

Canada is finished as a nearshore location until there is a substantial and long-term change in the value of the Canadian dollar relative to the U.S. dollar. There are other fundamentals at work in Canada that was making nearshoring more challenging. The labor market is tighter, with a lot of unemployed/underemployed who would have worked in contact centers going to the booming resource provinces of Alberta and Saskatchewan.

In response the BPO firms that are still in Canada have been shifting their focus from the nearshore to the Canadian domestic market. Yet Canadian businesses are now nearshoring and offshoring work too, with English going to India, the Philippines and South Africa and, lagging behind but increasing, French to countries such as Egypt, Mauritius, Morocco, Rwanda, Senegal and Tunisia.

[There is also growth in the Indian domestic market]. The difference is that you're not going to be serving domestic Indian clients out of the Bangalores, Calcuttas, Delhis, Hyderabad and the Mumbais because these are high cost/high inflation locations. Instead Indian-serving firms are going to locate in secondary cities for lower costs and because there are many dialects spoken in different regions.

There is a lot of interest in home agents but not as much as there were in 2007; the recession took a lot of wind out of peoples' sails and they held off on going home. There is a lot of concern by potential clients over data protection, supervision of and the ability to build team atmosphere with home agents. It is a big stretch for many companies in a lot of industries to have a virtual network of agents stretched over dozens or hundreds of communities as opposed to being centralized in one center.

The strong points remain around lower costs and attrition and hiring higher quality with home agents. We see them as growing but as a niche strategy rather than as a revolutionary way call center work is being done. Clients and prospective clients are saying "we're really interested in doing a home agent play but we're not sure we want to 100 percent but instead what we'll do is 20 percent and see how it goes."

There's organic growth in automation as call volumes increase but not that much shift from live agents. It has played roles in taking away of some of the live agent costs in the recession. But there's only so much that a firm wants to do with automation because there are risks that it will alienate customers. **CIS**

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## Call Centers: Say that again please!

In his “Desktop Productivity” blog, Francis Carden writes:

It never ceases to amaze me in 2010 that after entering my account/phone numbers into their phone system, the customer service agent still asks me for it; sometimes more than once.

I know the technical reasons for it but five years ago, I said if we fixed just 10 seconds worth of duplicated effort in our contact centers we’d have the potential to save over \$1 billion in all the call centers collectively. Truth is, I’ve seen contact centers implement

simple yet powerful automations to cut call times in half or even less. Call center administrators and CFOs often don’t believe it’s possible but it is and it’s not even expensive. In some cases, call centers will find solutions can be implemented in days and weeks with payback in a few months.

Effectively, in the first year, it cost you nothing to save money, each and every year. So why doesn’t every call center operations manager, CFO, VP etc.

jump at the chance to use this technology to save money – and a lot of it! I often think it’s because these people just do not realize it is possible still. Well it is and it is easy and it is quick. That’s why we started the Imagine the possibilities program (<http://imagine.openspan.com/>) and I’ve been blogging about the growing use cases of this kind of technology that we help solve. What else are you seeing? <http://franciscarden.blogspot.com/>

Visit Francis’s blog at <http://blog.tmcnet.com/desktop-productivity>

## UC Call Centers, Results Group

In his “First Coffee” blog, TMCnet’s David Sims writes:

Wondering what the top unified communications features for call centers are? For most organizations, presence, call recording and conferencing top the list, as they streamline operations and ensure quality of service.

It’s frustrating for your customers if their calls can’t be resolved straight away, and they need to leave a message or are informed that somebody will be in touch shortly. We’ve all experienced that.

But call center software provider **Zeacom** has found that delayed responses affect your organization even more – “in terms of double-handling, additional costs and possibly even lost business,” company officials say.

This is why the company engineered its ZCC Rich Presence with the features it has, to enable employees to make direct contact when they call one of their colleagues.

The product lets users view the status of all other users within the organization – are they in the office or not? It also shows users’ availability. You can also see the subject of users’ Calendar appointments. You can see the expected time of return and see at a glance if someone is on an inbound, outbound, or conference call.

The product also lets users request a screen pop return notification, when a user gets off the phone or returns to the desk. It also shows you if users are online for IM or on **Skype**. This might be a feature popular with management. You can dial with a click of the mouse and monitor levels of staff activity through Presence Reporting. And hey, if knowledge workers wish to organize an ad hoc conference call with colleagues in other parts of the world, they will only click on icons of co-workers who are actually at their desk

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

## Communications and Tech Trends From Dallas

In his “Communications and Technology” Blog, Rich Tehrani writes:

I am back from Dallas, Texas where I met with dozens of communications and tech companies and I gained a great deal of insight on industry hotspots as well as where the speed bumps are. [One of these is that the] VARs I spoke with are 50/50 on whether the Nortel enterprise acquisition by Avaya is good news. A few in-depth conversations showed me that the VARs most concerned haven’t had a chance to learn about Avaya’s integration plans for the future.

This seems to line up with the thoughts of David Yedwab a partner at research firm Market Strategy and Analytics Partners who told me the following via e-mail: “While the **Avaya/Nortel** Roadmap does a great job of providing direction and limiting the risk of product end-of-life concerns, as with most major changes, ‘the devil is in the details’. Each customer needs to work with Avaya and their channel partner (or partners) and other related vendors to map out a detailed future for their specific environment.”

Perhaps the most positive news for Avaya is that lately I haven’t heard anything about the channel fleeing to other companies.

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

## Selling Smart in Trying Times

There is no question we are navigating some choppy economic waters. Businesses have become far more cautious and mindful with their spending, and consumers have followed suit with their purchasing. Times are tough. Money is tight. And, as a result, we're all trying to be a little smarter.

But, as is often the case, crisis begets opportunity. For businesses, the opportunity is to streamline sales strategies – to sell smarter – by better targeting customers so you can truly give them what they need. There are three things every business should do to boost sales in these trying times: (1) improve your message and how it is delivered; (2) look at your customers' current state versus their desired state; and (3) strengthen and foster the customer relationship.

### Improve Your Delivery

The first thing you need to ask yourself is: How can I more effectively reach customers? As the economy has faltered, the consumer window for messages has narrowed. This means your message has less chance of reaching a consumer than it did, say, five years ago. It also means you need to make a greater effort to truly engage your customers.

One way to do that is by utilizing the phone. Next to a face-to-face meeting, a phone call is the most interactive method of communicating with a customer. TV commercials can be fast-forwarded. Direct mail can be discarded. E-mails deleted. But with a phone call, you at least get your foot in the door. If nothing else, you have the opportunity to get your company's name heard and present a value proposition. And, with people traveling less because of the economy, the likelihood of reaching customers at home has increased.

### Tailor Your Message

The next step is to take aim. I'm talking about precise, laser-beam targeting. You have to set your sites on a single, highly-specified member of an audience. To do this, you need to access a consumer database that allows you to screen and profile the audience both demographically (by traits like age, income and occupation) and psychographically (by traits such as values, buying habits and lifestyles). You can use these traits to identify people most apt to buy specific products or services.

After pinpointing your target audience, you need to take everything you know about them and produce a persuasive hook – one that speaks directly to the individual. Say you are targeting mid-level income families with two or more kids who have taken at least one vacation in the past five years. You could use the economy as your hook, contrasting a trip to the beach or Disney World with the cost benefits of a special-offer water park vacation.

### Address Customer Need

To make your message stand out, you have to know your customer. It's Business 101. Ask not what you want from your customer, but what your customer wants from you. You need to know your customers' current state versus their desired state. Where are they now and



By **Rick Lawson**, Vice President of  
New Business Development  
InfoCision Management Corporation

where do they want to be? How can your service help get them there?

For example, there are thousands of different attributes people look for when they buy a car – status, comfort, fuel economy, family transport. Your sales people need to identify which holds the most weight for a customer and tailor the pitch accordingly. This is another instance where the phone is a superior delivery method. On the phone, the sales experience becomes much more consultative. Consultative salespeople dig deeper, as a friend or adviser would. They educate and dissect the customer's needs and point to better options.

### Earn Customer Loyalty

To build market share, you either need to get more customers or get more from the customers you have. With the economy having a limiting effect on customer acquisition, it is perhaps more important than ever (though it's always important) to keep the customers you

have loyal. Now is the time to get close to your customers; to earn their loyalty. Now is the time to be more proactive in protecting your existing customers and the business you have.

Set up quarterly review calls to check in and find out what your customers want and need. These are the calls where bonding takes place. They build trust. Customers are more likely to come back to you tomorrow if you help them meet their goals today. They will have confidence in you and your product. Customers will stick with the businesses that stuck by them in tough times. **CIS**

*Rick Lawson is vice president of new business development at InfoCision Management Corp. Reach him at [rick.lawson@info-cision.com](mailto:rick.lawson@info-cision.com). In business for over 25 years, InfoCision is the second-largest privately held teleservices company and a leading provider of customer care services, commercial sales and marketing for a variety of Fortune 100 companies and smaller businesses. Along with call center solutions, InfoCision offers business intelligence, digital printing, direct mail solutions and fulfillment services. For more information, visit [www.infocision.com](http://www.infocision.com).*

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# Rethinking Recording

This summer may be the opportune time for contact centers to take a renewed look at their recording strategies. If their organizations are switching over from PSTN/TDM to IP, which will require in most cases buying new recording tools, it makes sense to utilize this occasion to rethink how they want to use recordings.

With the demand for products and services increasing, there is a redoubled focus on retaining and building new as well as on existing customer relationships that requires staying on top of quality issues. There is a growing realization by senior management that call recordings contain valuable information about customers' behavior, desires and wants and agents' performance that can be mined with speech analytics. Thieves also see the value in recording-captured data, leading to ever-stricter regulations and standards, such as the Payment Card Industry (PCI) data security standards (PCI-DSS) that demands tougher controls to prevent unauthorized access.

Just on the horizon, the growing popularity of text-based communications – chat, e-mail, SMS and social media – require screen captures and integrating them with call recordings. This unification, along with exchanges gathered from websites and automated voice systems obtains complete and captured multidimensional views of customer/agent interactions. Down the road the IP transition will enable a shift from narrowband to wideband a.k.a. HD voice that enables greater voice range hence more natural sounding acoustics compared with that delivered over TDM that in turn will permit more information to be obtained from voice conversations.

“The need and market for contact center recording is not going away; if anything it is getting stronger,” reports Jim Davies, research director, [Gartner](#). “There is increasing desire for quality monitoring to ensure performance, a need to improve customer experience, and compliance with stricter PCI standards that combined with the TDM to IP shift are boosting investment in recording systems.”

## From Random to All

These trends are prompting more contact centers to employ a strategy of recording 100 percent of calls. Random sampling is no longer adequate in today's (and tomorrow's) environments.

Matt Storm, NICE Systems director of Americas marketing reports that a survey of his firm's customers reveals that of



those having less than 100 percent coverage, 57 percent expect to increase that amount by sometime in 2010, with more than one-third of those planning to deploy 100 percent recording.

“Respondents said regulatory compliance is a primary driver,” reports Storm. “Greater recording coverage also helps to improve the quality management process by providing more call samplings for evaluation and allowing managers to investigate specific performance issues such as script compliance or excessive transfers and hold times. Speech analytics also delivers the highest return on investment when able to process higher volumes of recordings.”

Brian Spencer, president, [OAISYS](#) is seeing more small-mid-sized businesses (SMBs) especially increase the types and volumes of calls being recorded. Until recently, he says the SMB conversation around voice recording consistently started with a specific compliance or liability requirement; quality control was a secondary benefit if not an afterthought.

“Businesses have become more keenly aware of the call recording drivers, and are taking the necessary steps to implement effective compliance and risk management programs,” says Spencer. “More than ever, companies want to understand what influences customers to continue doing business with them.”

## Protecting the Data

All contact center recording strategies must include an analysis of methods to best comply with regulations and standards to prevent or more accurately limit exposure and illicit acquisition of corporate, customer and employee data. This issue also feeds back into customer retention; few events are more damaging to a company's goodwill and sales than having its customers'



data exposed through failing to follow the laws and procedures aimed at protecting them.

One of the most important of these rules is the PCI-DSS 3.2 standard, which it says prohibits storing any sensitive authentication data, including card validation codes and values after payment authorization even if encrypted. It also bans using any digital audio recording after payment card approvals. Where technology exists to prevent recording of these data elements it should be enabled. If these recordings cannot be data mined, storage of card validation codes and values after authorization may be permissible as long as appropriate validation has been performed. The physical and logical protections defined in that standard must still be applied to these call recording formats.

Another key regulation is the Health Insurance Portability and Accountability Act (HIPAA). It requires organizations to safeguard patients' health information from unauthorized access. The Patient Protection and Affordable Care Act, signed into law by U.S. President Barack Obama March 23 that will enable some 32 million more Americans to afford health care will also create much more data that must be protected in compliance with HIPAA regulations.

"The burden of responsibility for ensuring compliance standards are met lies in the hands of each organization, however, there are a number of ways that recording solutions can enable customers to become or stay compliant and/or do not prevent them from being able to meet certain policies," says Aspect product marketing manager Kathy Krucek.

"The main areas of how recording solutions do that is through providing security around recordings via encryption and providing

the ability to not record sensitive information (e.g. for PCI DSS compliance). Also, by providing various storage/archiving strategies to allow organizations to keep recordings for a period of time and then automatically being able to purge them where they are required to do so after X number of days (e.g. for HIPAA compliance). Each organization must understand their own industry guidelines and company legal and HR policies to evaluate recording solutions that ensure these can be met."

One route to consider is going above what is stated in the regulations and standards, which are in most cases are the minimum stipulations to enable these rules' goals to be accomplished. Jim Shulkin, director of marketing, Envision Telephony points out that in the case of PCI-DSS 3.2 if a contact center routinely requests card verification codes then one potential best practice is to pause the recordings to prevent this data from being captured. Yet even if the codes are not recorded centers should consider recording file encryption, routine deletion of recordings when permissible and keeping a record of all those who play recordings. In some cases organizations have even put monitor screen guards in place to prevent data from being visible to others on the call floor. Pausing or deleting recordings is not always realistic, he points out though, as many organizations and industries have their own regulations prohibiting the deletion or alteration--removing the sensitive data--of these records.

"The PCI DSS specifically dealing with call center recordings is evolving as the technologies to both query the data and reasonably secure it becomes more mainstream and widely attainable," says Shulkin. "Plus, many brand-conscious companies that are bound to PCI compliance prefer to go above and beyond the stated stan-

## Out of Center Recordings

Recording interactions is no longer just for contact centers. Increasingly these tools are being deployed in other parts of enterprises, reports Ray Bohac, president and CEO, Call-Copy. Accounts receivable, legal, sales and senior executives are realizing the value in recording their interactions. Their reasons include proof of promise-to-pay, identifying ways to increase conversion rates or up-sell opportunities, compliance and risk management and simply wanting records of conversations.

There are a few differences between in-center and out-of-center recordings Bohac points out. At the most basic level, the applications used outside of contact centers are the same as those inside it. Where they differ is how they are used. For example sales teams can perform peer reviews of sales calls or presentations through call recording playbacks.

Out of center recordings use the same recording hardware and software as for contact center recordings but that depends on the organization. CallCopy has implemented solutions for organizations that wanted to maintain all

recording on a single system, and are able to maintain separation between groups including customizable permissions and audit trails. Others prefer to use a separate hardware/software instance in the cloud.

When considering recording non-contact center calls, Bohac recommends getting full buy-in from all affected groups. Stress the benefits that each will receive by having access to recorded transactions to improve processes, drive efficiencies and mitigate business risk and liability. Consider on-demand recording as it can help avoid any feeling of "big-brother" watching. Also consider how other traditional contact center technologies, such as speech analytics and work-at-home capabilities can benefit the various groups.

"Advances in speech analytics technology have made it much easier to extract business intelligence from the abundance of interaction data via recordings," says Bohac. "In addition, as telecommuting grows in popularity, having another managerial touch point and/or the ability to record interactions are a plus."



dards where possible in order to insure customer data protection to their own higher corporate standard.”

### Multichannel Strategies

Call recording strategies must also incorporate, and be incorporated, into those of other channels so that organizations can have a complete view and access to customers interactions. While these other methods: chat, e-mail, SMS, IVR and speech self and Web self-service still rank below voice as communications methods their use is increasing.

“I’m not seeing much true multichannel integration yet but it will happen as software suites broaden and organizational maturity increases,” says Davies.

Kristyn Emenecker, solutions marketing director, Verint Witness Actionable Solutions says multichannel interactions bring together new dynamics between traditional screen recording and desktop analytics. For instance, it allows taking desktop analytics and trigger recordings of specific events such as an e-mail or text chat. It can also take key information from the screens such

as transaction amounts, customer account numbers or other pieces of information and tags them to the recordings.

“With having more complete data to analyze, we can then marry it up to all communications associated with those customers: including such vehicles as text messages and e-mail,” says Emenecker. “This makes the quality and analytics processes more inclusive of all customer channels.” **CIS**

### The following companies participated in the preparation of this article:

**Aspect**  
www.aspect.com

**CallCopy**  
www.callcopy.com

**Envision Telephony**  
www.envisioninc.com

**NICE**  
www.nice.com

**OAISYS**  
www.oaisys.com

**TelStrat**  
www.telstrat.com

**Verint**  
www.verint.com

### The HD Strategy

As contact centers move into the IP environment with new recording solutions they should also look down the road at preparing to handle HD/wideband voice. This new mode promises to greatly improve communication with customers by hearing more what they are saying and in doing so obtaining literally unheard of information via recordings. It permits for example agents to distinguish between similar-sounding names and syllables much easier. These features will reduce talk time, repeat calls, call costs and boost customer satisfaction.

“The advent of HD voice in contact centers promises to enhance customer/agent interaction with crystal clarity and a vibrant ‘in-the-room-like’ presence,” says Ed Templeman, director of marketing, TelStrat. “With double the sampling rate and more than double the frequency range of standard PSTN calls HD voice promises to alter the aural landscape for agents and customers alike. The increased fidelity will also allow greater accuracy in IVR, analytics, and other speech-related systems.”

To date though, most HD voice is emerging in the area of walk-in retail centers or branches, reports Matt Storm, NICE Systems director of Americas Marketing. That is because each link: from the caller to the contact center agent must be in wideband HD – no PSTN – and to enable that outside the contact center to a consumer would be a challenge, akin to happened with TV when it went to HD.

“Until this takes shape outside the contact center to provide true end-to-end HD, we will continue to see very little of this in the industry,” says Storm.

While given current economic conditions, HD implementation time scale is likely three to five years, but recording vendors and customers would do well to be ready, Templeman points out. The impact of HD voice will be felt in increased network configuration, processing horsepower, and recording storage and archiving requirements, and in resulting costs. While more sophisticated compression algorithms will alleviate most of the burden, doubling the sampling rate and the frequency range means every part of a contact center’s network must HD-capable.

Given the cost and complexity contact centers should start now by making sure their PBX vendors supports the G.722 wideband speech codec standard at a minimum and/or can easily add support for future codecs, recommends Templeman. Key suppliers such as Avaya and Cisco others now incorporate them in their telephony offerings. Contact centers should also make sure that HD-compatible phoneset offerings are available. When choosing recording solutions, they need look to vendors that are certified developers on HD-capable PBX platforms, have flexible, easily upgradable solutions, and have a history of reacting quickly to market demands.

“The true value of HD voice can only be realized when all portions of the network such as the PBXes, phones and recording systems support wideband,” says Templeman. “Even something as seemingly unimportant as a handset speaker can affect the result: if it was designed to match the limits of PSTN frequency response.”



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## Social Customers Are Your Customers: Just Ask nGenera

Skeptical about the value and ROI of tapping into customers via the social channel? Don't be. None other than nGenera, a leading customer experience management solutions firm believes that there is a need and market for products to enable contact centers to tap into customers via social media. nGenera's ([www.ngenera.com](http://www.ngenera.com)) nGenera Customer Interaction Management (CIM) division has included social channel access including social self-service and community management in nGen CIM 9, announced March 31.

nGen CIM 9, says nGenera "enables organizations to deliver a superior experience in the time of the social customer. "[emphasis ours]

Here are key excerpts from the release:

"nGen Community, powered by nGen Knowledgebase: Customers can now engage in social self-service by creating and sharing knowledge and experiences as well as participating in community management. Community members interact in forums and contribute via wiki while the organization retains overall control. Members can evaluate content and users through reputation modeling. nGen Community's integration with nGen Knowledgebase ensures community-generated content is fed back into the knowledge base and can be accessed by users through federated search.

"nGen Social Media: Contact centers can now listen, interpret, and respond to conversations across popular social networks such as Twitter, Facebook, and YouTube. nGen Social Media swiftly identifies chatter, prioritizes incidents using sentiment technology, and then, depending on sentiment score, routes incidents to the agent the same as a traditional customer-initiated inquiry. The agent can then respond using social media or traditional customer interaction channels.

"nGen CIM 9 helps organizations achieve an ROI on their business and social strategies by empowering customers to engage and collaborate using their channel of choice," said Wade Pfeiffer, General Manager of nGenera CIM. "This release



makes nGenera CIM the only vendor in the space to offer a complete solution suite to the enterprise."

Martine Kohler Andersen from KMD shares: "We are testing nGen Community and nGen Social Media with Denmark citizen services and are pleased with the results. The integration of nGen Community and nGen Knowledgebase is incredibly valuable as it ensures the quality of community content and feeds it back into the knowledge base so it can be found by those who need it in the future."

"nGen Social Media is also proving to be a simple and elegant solution for monitoring and responding to citizens using social media sites," add Andersen.

Learn more about tapping the social channel. Attend the Social Customer Summit ([www.tmcnet.com/voip/conference/the-social-customer/2010/West](http://www.tmcnet.com/voip/conference/the-social-customer/2010/West)) at ITEXPO West 2010 Oct. 4-6, 2010 at the Los Angeles Convention Center in Los Angeles, Calif. **CIS**

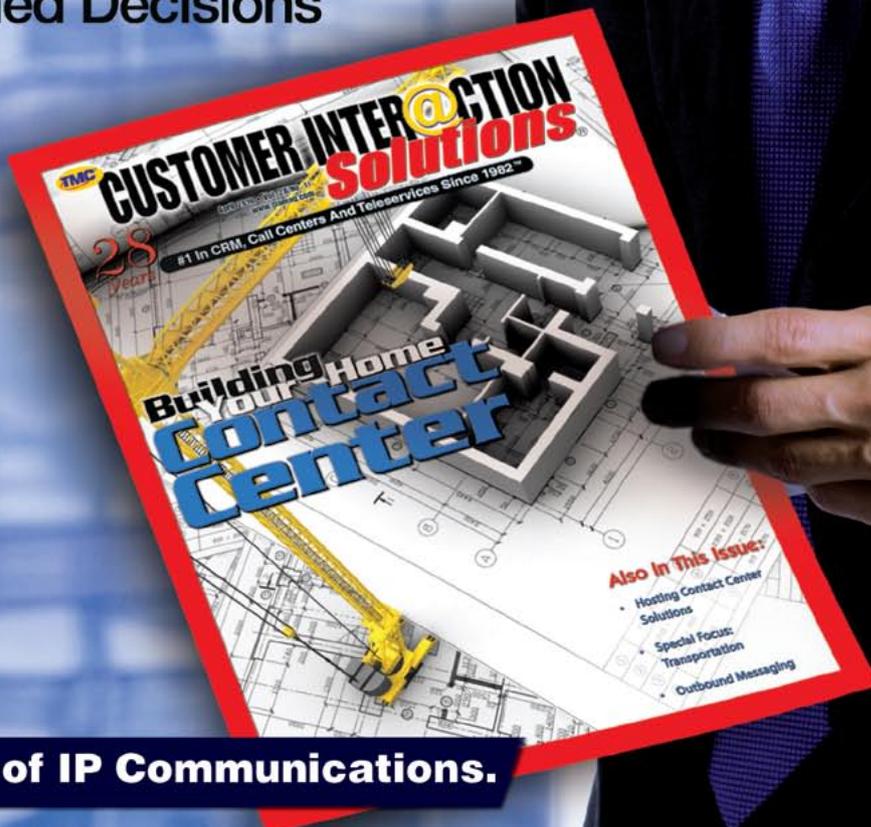


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# Communicating Through Disasters

**T**he pathway to effectively avoiding, and that is not possible responding to and recovering from disasters – is accurate and timely communications with employees, clients, patients and customers. As the following examples illustrate, these terrifying events can be successfully planned for with the right solutions.

## Helping Hospitals Help Others

Beryl ([www.beryl.net](http://www.beryl.net)) is a healthcare-exclusive business process outsourcing firm headquartered in Bedford, Texas. It handles more than seven million interactions annually for its clients.

When a disaster threatens and/or strikes, Beryl holds an initial information gathering call with the affected client in which all of the details are discussed. A project plan is developed and reviewed by the support team. Training is conducted to ensure all Beryl agents (called call advisors) are aware of the situation and are prepared to assist the client's callers in a caring and compassionate manner.

In October 2007, Beryl came to the aid of Palomar Pomerado Health when fires stretched across Poway and Rancho Bernardo, Calif., destroying hundreds of structures and forcing thousands of people from their homes. When the blazes threatened Palomar Pomerado's facility in Poway, patients were evacuated to other healthcare centers with little advance notice. Palomar Pomerado contacted Beryl, which set up an emergency telephone support line. From mid-October to mid-November Beryl's advisors handled hundreds of calls, assisting patients' families in locating their loved ones.

In June 2008, Beryl assisted Columbus (Ind.) Regional Hospital, a 225-bed facility when it had to temporarily close its doors from 11 inches of rain that caused the area's Flatbush, Wabash and White Rivers to overflow. Beryl became the main

point of contact for the communities the hospital serves. Calls were routed to Beryl's center while special lines were set up to handle patient information and transportation requests. Beryl worked closely with Columbus Regional Hospital to prepare communication to ensure all callers were informed and when necessary, directed to the right alternative facility. Beryl provided these services until October 2008, when the facility reopened.

Varolii alerted for the CDPH enabling it to quickly and accurately deliver vital messages to key organizations and individuals such as county and local health departments, key physicians and hospital administrators when there is a credible threat or actual incident. Varolii's solution uses multiple channels: phone (landline or mobile), fax, e-mail, text messaging and pagers to get the word out. Varolii guarantees delivery within a five-minute timeframe. It also provides real-time reporting to better respond to the situation, track recipient status, ensure that business continuity/disaster response plans and procedures are followed and create audit trails for regulatory compliance.

Varolii assisted CDPH with implementing the CDC-required alerting function. This included setting up the alerting script templates, recipient lists and contact information, routing instructions based on

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**“Varolii has become an integral part of California's bioterrorism response initiative.”**

**– Robin Rees, director of customer programs, Varolii**

## On Guard for Bioterrorism Threats

Few dangers are more insidious and deadly than bioterrorism, whose agents can be in some cases literally planted virtually undetected and directed one-on-one, in small groups or mass. The California Department of Public Health (CDPH) has a special team that stays on top of this risk. It focuses on enhancing state and local health surveillance and response for diseases due to biological agents such as anthrax, botulism and smallpox.

The CDPH bioterrorism team is specifically responsible for compliance with the Centers for Disease Control (CDC) Public Health Information Network program requirement to manage ongoing bioterrorism threats by alerting key agencies and staff.

To that end, since 2003, Varolii ([www.varolii.com](http://www.varolii.com)) has been supplying auto-

agreed-upon message subject descriptors and corresponding recipient descriptors. It also included putting together secure information archiving for subsequent viewing and the facilitation of secure discussion of public health issues. CDPH imports a recipient list; with a simple-to-use and flexible application; message recipients are able to manage their own notification profiles to ensure up-to-date information is available to the state agency on an ongoing basis.

Fortunately at press time the CDPH has not had to use the Varolii solution for a bioterrorism incident. The system has been regularly used, though, for food safety alerts and is tested on a regular basis.

“Varolii has become an integral part of California's bioterrorism response initiative,” says Robin Rees, director of customer programs. **CIS**

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Brendan B. Read, *Senior Contributing Editor*



## Don't Start Bulldozers Yet On Contact Center Expansion

**N**oble Systems came out with a survey in late March that it had commissioned which revealed that 97 percent of its contact center respondents expect their businesses to grow or remain stable in 2010, a sign, it says “of strong confidence in the industry.” According to the survey, 48 percent expected that their business would grow in 2010 while 49 percent believed it would remain consistent. Only 3 percent anticipated a revenue reduction for the year.

This is great news. Yet is it time to finally fire up the bulldozers on that new contact center?

While the fiscal skies are beginning to lighten up, the hard reality is that the U.S. is still far from out of the downturn gloom. High unemployment and underemployment and fears that these trends will continue plus long-term indebtedness and tightened credit will squish consumers' confidence and pocketbooks. Rising property taxes and user fees and reduced services resulting from lower sales taxes, leading to looming state and local government agencies' layoffs are adding to the pall.

Bottom line: limited money in the wallets means limited calls to contact centers and less web interactions for orders and service.

Yet would a return of good times mean likewise for North American contact centers? Well, not exactly.

Yes, companies have finally realized that customers prefer to speak to high quality agents and will switch to competitors, depending on the ease for specific products or services, if the service stinks. A rising economy also means, though, a return to higher contact center turnover and costs, leading to ultimately fewer centers, and jobs. Why? As web and IVR/speech rec self-service and outbound notifications take the simpler calls, contact center agents are left with the difficult ones. Unfortunately, too many centers are infested with poor supervisors, the product of lazily promoting the best agents to those jobs: including those without the talents to manage people.

Working six to eight hours being screamed at by customers... then being yelled at by incompetent coaches and leads... is it any wonder why all too many agents slam down their headsets and walk out... and into better paying/better working conditions jobs as these gradually appear with the slow economic turnaround.

Adding to the crunch text-based communications like social media requires agents with superior comprehension and communications skills. Yet most existing agents and those willing to be hired by centers are too often do not have these abilities

thanks to the once-great American educational system having been turned into a glorified babysitting service.

The most likely place to hear ground being churned for new contact centers is Latin America to serve the rapidly growing U.S. Hispanic population: at lower costs than at home. Many of these countries' urban areas have workforces that are fluent in English, thereby providing “one-stop shopping.” American Spanish-speakers appear to be less concerned with having their calls handled out of the country than those whose language preference is English. Outsourcing is the most cost-effective means of tapping that workforce for all but the largest organizations.

Is the environment dismal for domestic contact centers? Not if these steps are taken:

- Make web and voice self-service great experiences, couple them where needed to outbound notifications link them with live agents and customers' experiences (and attitudes) will be greatly improved.
- Move to more flexible home-based agents that enable higher quality service and productivity at lower costs. This is the best way to tap into workers who speak other languages including Spanish, French and Mandarin without outsourcing.
- Hire smart, pay more especially for skilled work like social media. Screen and test applicants to get the right people whom you need. Don't rely on diplomas and degrees. They're the crutches of hopeless HR departments. And don't jerk staff around on hours and shifts. Find out which ones work best for them attitude/performance/lifewise.
- Get smart on supervision by hiring and training the best people for those critical jobs.

Together these methods will cut costs, improve productivity and lead to better, more profitable service – benefits if achieved by every organization in all departments – will help create a solid, sustainable and job-wealth-creating economic recovery at home. **CIS**



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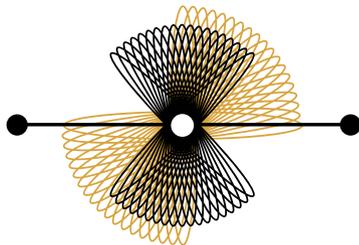
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