



CUSTOMER INTER@CTION *Solutions*®

May 2010 • Vol. 28/No. 12
www.cismag.com

28
Years
of Excellence

#1 In CRM, Call Centers And Teleservices Since 1982™

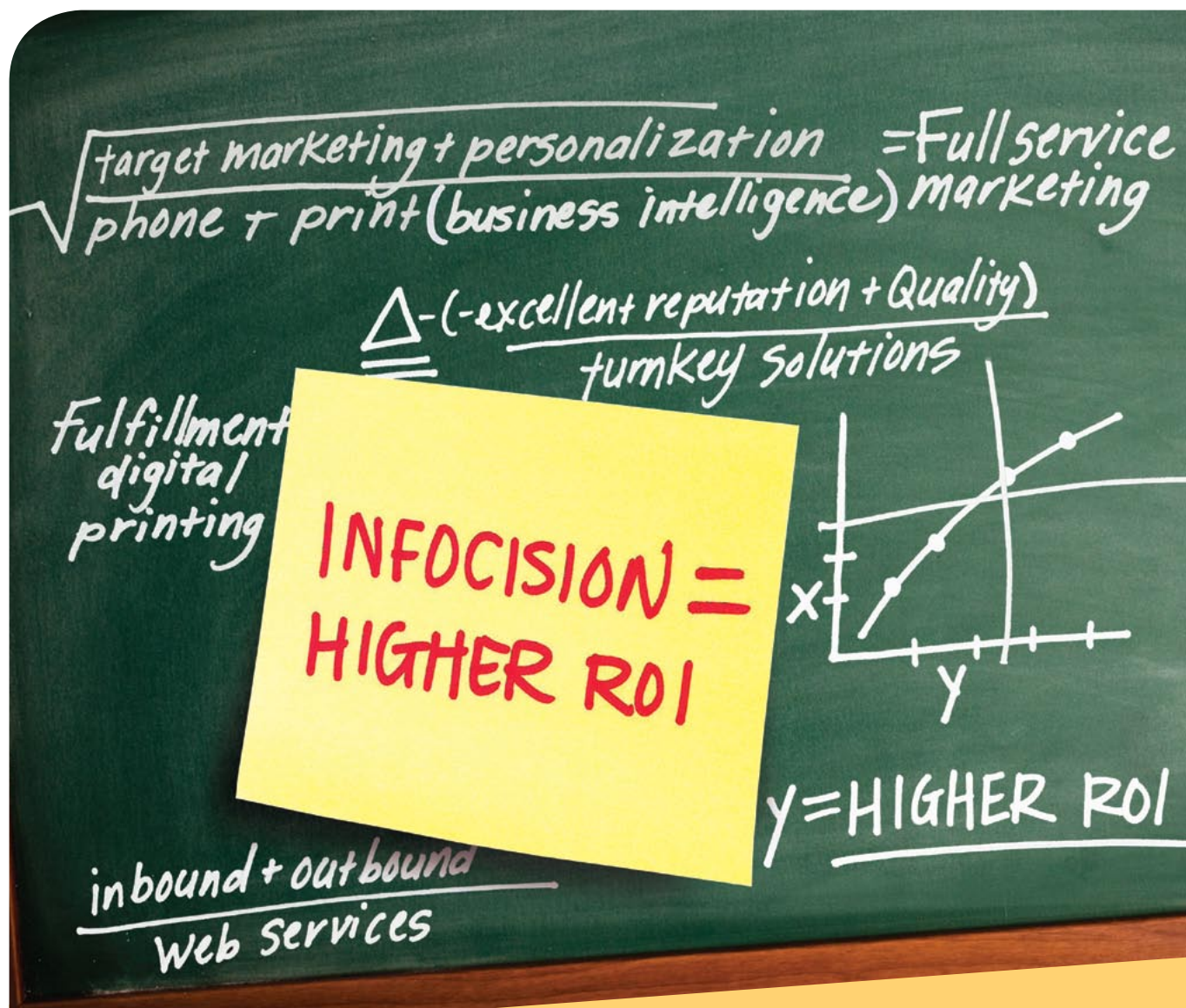
Verint: Intelligence in Action



Also In This Issue:

- Widening Quality Management Focus
- Tuning In To Multiple Channels
- CRM Excellence Awards, Part 1

Elan Moriah, president,
Verint® Witness Actionable Solutions®
and Verint® Video Intelligence Solutions



We make it that simple.

Our full array of marketing services is a proven formula for a higher ROI. On-demand variable printing, call center solutions and integrated web services are all delivered to the right person, at the right time, with the right message. At **InfoCision**, we're expanding our services to provide you with a simple solution for all of your customer needs.

InfoCision

Steve Boyazis, Executive Vice President • 330-670-4777
www.infocision.com

Rich Tehrani, CEO, TMC



What's the Value of Social Media to the Sales Process?

For the past several issues, I've touted the power of social media in the contact center space, including an analysis of the penetration of social media in contact center environments (see the April CIS Publisher's Outlook). The million-dollar question, though, is how important should social media be to the sales process?

During a recent trip to Dallas, Ken Murray, president of VanillaSoft, agreed that social media is going to be very important because it will enable salespeople to understand much more about their prospects before they ever pick up the phone. The question he poses, though, is this: "If you can do in-depth research on five prospects and call them and get one new sale, that's great; but, if you can cold call 20 prospects and get two sales, at the end of the day, isn't that still better?"

I posed a series of questions to Ken about social media and the evolution of contact centers. This is what he had to say. (For more of Ken's comments read my blog entry: <http://tmcnet.com/27963.1>, and check out more of Ken's own comments on the contact center evolution in a TMCnet video filmed in Dallas: <http://tmcnet.com/27964.1>).

As a pioneer in the contact center space – how have you seen it evolve lately?

The biggest change is there is a multitude of technology choice available to businesses to power their selling efforts. Thanks to SaaS-based offerings, the smallest businesses get equal access to the best technologies at an affordable price and can level the playing field and extend their global reach. That was simply impossible only a few years ago. We have customers in eight countries, all made possible by the Internet and the technologies we have selected to enable our selling effort. Three years ago, if you had told me VanillaSoft was going to play big in Ireland, I would have laughed. Because of technology, we service customers there as though they are in the U.S.

How is social media changing outbound sales?

That's a big question with a complex answer. Right now, it is making all organization re-think their approaches to cold calling. Companies making outbound dials are wrestling with how much research should be done on a prospect before each call is placed. The question on the table is can a sales person socially connect to a prospect prior to that first contact being made or,

through social research, learn enough about the prospect that it will enhance the call? If the answer is yes to either, then what is the value of that social connection or social research? Does it translate into revenue for the company or is it a waste of valuable selling resources?

What do companies need to know about social media and contact center/inside sales integration?

The most important thing to know is that the final answer has not been written. Too many times we think of what is new as the next and final solution. Social Media will be a valuable tool and continue to gain attention and traction to all groups selling. But, like all tools, it needs to fit within each unique selling strategy and it needs to be tested and measured just like any platform, process or selling tool. The end result will come down to ROI and the answer to the most fundamental question we all ask as sales people and marketers: Am I better with it or without it?

Your company was located in New Orleans during Hurricane Katrina, how were you able to stay operational during the storm?

First and foremost, we have a great team of people who care and are dedicated to serving not only our customers but each other. We had somewhere around 50 people who lost homes. Needless to say, as a company, we were hurting just like our community. What allowed us to not only survive, but thrive, was attitude first and technology second. The SaaS model was relatively new back in 2005, but we had chosen well. We had all of the important technologies needed to run a software company with geographically disparate customers and employees in place, including redundancy we had built virtually. We did not have a single technology asset based in our facility in New Orleans. Rather, we had redundant servers in Colorado, a virtual PBX system, remote management systems for back-up, and so forth. But, at the end of the day, it was the people and their ingenuity and foresight that allowed us to survive and win. For that, I am grateful. **CIS**

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

Group Publisher
Richard Tehrani (rtehrani@tmcnet.com)

EDITORIAL

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

CONTRIBUTING EDITORS

David Sims, Susan Campbell, Stefania Viscusi

TMC™ LABS

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

ART

203-852-6800 (cisart@tmcnet.com)
Senior Director, Creative and Operations, **Alan Urkawich**
Graphic Designer, **Lisa A. Mellers**
Production Manager, **Stephanie Thompson**

EXECUTIVE OFFICERS:

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

— To Subscribe, Call: 203-852-6800 —

Or write to the circulation director at srusso@tmcnet.com. Subscription rates (published monthly): Digital Subscriptions free for qualified U.S., Canadian and Foreign subscribers. Print Subscriptions free for qualified subscribers in the U.S.A. only. For non-qualified U.S.A. subscribers, \$59. All Canadian subscribers, \$89. All Foreign (air mail), \$109. All orders are payable in advance in U.S. dollars drawn against a U.S. bank. Connecticut residents add applicable sales tax.

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

Postmaster: Send address changes to CIS magazine, Technology Marketing Corporation, River Park 800 Connecticut Ave. 1st FL., Norwalk, CT 06854-1628 U.S.A. Canada Post: Publications Mail Agreement #40612608 Canada Returns to be sent to: Bleuchip International, P.O. Box 25542, London, ON N6C 6B2, CANADA

Reader Input: CIS encourages readers to contact us with their questions, comments and suggestions. Send e-mail (addresses above), contact our Web site (www.cismag.com) or send mail.

We reserve the right to edit letters for clarity and brevity. All submissions will be considered eligible for publication unless otherwise specified by the author.

Reprints: For authorized reprints of articles appearing in CIS, please contact The YGS Group, 717-505-9701 or 800-501-9571 x105, tmcnet@theYGSgroup.com.

Lists: For list rentals, please contact Glenn Freedman at glennf@i-i-s-t.com or call 914-765-0700 x 104.

ADVERTISING SALES: 203-852-6800

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

EXHIBIT SALES: 203-852-6800

VP of Events, **Joe Fabiano** (jfabiano@tmcnet.com)
Global Events Account Directors (Companies whose names begin with A-L or #s): **Maureen Gambino** (mgambino@tmcnet.com)
Global Events & Webinars Account Manager,
Kevin Lake (klake@tmcnet.com)

Editorial Offices are located at River Park 800 Connecticut Ave. 1st FL., Norwalk, CT 06854-1628 U.S.A. **Customer Service:** for all customer service matters, call 203-852-6800.

CUSTOMER INTER@CTION Solutions® magazine has been the voice of the industry since 1982. It is written by industry practitioners for industry practitioners and is regarded worldwide as the "Bible" of the industry. An annual Buyer's Guide is provided as a feature of the December issue.

Copyright © 2010 Technology Marketing Corporation. All rights reserved. Reproduction in whole or part without permission of the publisher is prohibited.

Customer Inter@ction Solutions® and the TMC Logo are registered trademarks of Technology Marketing Corporation.

A Technology Marketing Publication

TMC
River Park 800 Connecticut Ave 1st Fl.
Norwalk, CT 06854-1628 U.S.A.
Phone: 203-852-6800 Fax: 203-295-3773

IN EVERY ISSUE

- | | |
|--|---|
| <p>1 Publisher's Outlook
By Richard Tehrani, CEO, TMC</p> <p>4 High Priority!
By Erik Linask,
Group Editorial Director, TMC</p> <p>14 Customer Interaction News™</p> <p>16 From the TMCnet Blogs</p> | <p>31 The Integrated Marketplace™</p> <p>31 Advertising Index</p> <p>32 Logout
By Brendan Read,
Senior Contributing Editor</p> |
|--|---|

What's on the Cover



**Verint Systems:
Intelligence in Action**

pg **6**

CALL CENTER TECHNOLOGY

- 10 Matching Recordings With Needs**
By Brendan Read, Senior Contributing Editor

CRM, BPO & TELESERVICES

- 18 Tuning In To Multiple Channels**
By Brendan Read, Senior Contributing Editor

OPERATIONS AND MANAGEMENT

- 24 Widening the Quality Focus**
By Brendan Read, Senior Contributing Editor

AWARDS AND RECOGNITION

- 28 'Customer Interaction Solutions' 11th Annual CRM Excellence Awards, Part 1**

CASE STUDY

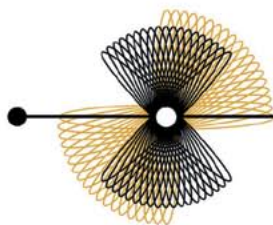
- 30 Scaling Tower Life's Needs With UC**
By Brendan Read, Senior Contributing Editor

To receive free information from our premium advertisers, please visit freeinfo.tmcnet.com.

CONTACT CENTER SOLUTIONS

SPONSORED BY:

GLOBAL ONLINE COMMUNITY



INTERACTIVE INTELLIGENCE

<http://callcenterinfo.tmcnet.com/>
Log On Today!



POWERED BY: **TMCnet**

Erik Linask, Group Editorial Director, TMC



Leading Logic

So you want leads. Why shouldn't you? It's how you grow your business, just like everyone else. And there are certainly myriad ways to collect them, not the least of which today is through a growing list of friends and followers of your various social media efforts.

So you collaborate with your marketing team to create the best possible programs for reaching your audience, and you start seeing the leads come. You get 2,000 registrants for your Webinar. Your Facebook group members and Twitter followers double. You fill two large fishbowls with business cards at a tradeshow. Throw in the hundreds of people who have already signed up to receive the eNewsletter from your online community and – great news – you have built a potentially staggering volume of leads in a short period.

The truth is, though, it's only great news if you are properly equipped to handle those leads. If you aren't able to get the right leads to the right staff in a timely fashion so they can act on them before they go stale. In fact, Paul Dunay, Avaya's global managing director of services and social marketing, recently mentioned to me that following up on large volumes of quickly collected leads can be a daunting task – no matter how many leads you are able to generate, you also must have the capability to follow through on them effectively.

One of the keys, of course, is building automation into the process. The more a company is able to leverage rules and routing engines in its sales and customer service processes, the more efficient its sales and customer service efforts will be. In fact, there are quite a few vendors already adding increased automation into their software – look at Interactive Intelligence's Interaction Process Automation, for instance.

But high lead volume over short periods – peak volumes – require increased, actionable intelligence, such as lead scoring, so that the best leads – by whatever criteria you deem most reliable – are prioritized and delivered to the appropriate sales teams. It is often possible to segment sales teams by their strengths or areas of expertise (i.e., product type, communication medium, etc.) and further increase success rates.

Referring to the complex world of communications today – it's not simply a question of manning phones any more – VanillaSoft President and CEO Ken Murray explained, "There are so many moving parts that allow you to try to locate the best person to contact at an organization... you need some form of automation to make the process more efficient."

Perhaps the most intriguing of those moving parts is social media. When you factor in the social media campaigns many

businesses have begun, the task of managing customer interactions and leads becomes even more taxing because you must sift through volumes of information to find not only the hot leads, but also other valuable insights from followers.

There is no question that social media is a growing force in the business world. If you turn away from your TweetDeck for a minute, you are likely to miss countless tweets and retweets about your business sector, and managing Facebook and LinkedIn groups has become a full-time job in many cases. But, for the business that is able to capitalize on the combination of increased exposure and marketing opportunities, the world of social media will become a gold mine in its own right.

The contact center is a natural haven for social media, of course, because it allows for the integration of social interactions directly into the CRM and sales lifecycles.

"I believe the best place to build a business case around social media is in the call center," said Dunay, in fact. "Where else can you deliver immediate benefits to your existing customers and delight them a superior customer experience at the same time?"

The question is not whether to engage in social media, rather, to what degree and how can you best integrate social media into your existing strategies. Once you determine the most effective strategy for your contact center environment, you'll be on your way to leveraging this great communications phenomenon to increase your business opportunities. But, as Murray notes, don't forget the old telephone – the one thing successful organizations never forget is that human contact is still the cornerstone of business communications.

For more on social media in the contact center, be sure to read Rich Tehrani's Publisher's Outlook, where he discusses some of the most telling results from a recent survey conducted by Avaya on social media in the contact center.

Also, book your tickets now for Los Angeles, where The Social Customer Summit will take place October 4-6, 2010, collocated with ITEXPO West. The conference sessions at The Social Customer Summit will provide an intriguing and influential look into the confluence of traditional contact center strategies and the latest in social media from many of the foremost experts in the space. **CIS**



Introducing the Outbound Call Center Online Community

Five9's solutions deliver the benefits of million-dollar systems, but without their hidden costs. Five9's predictive dialer efficiently and effectively helps manage product campaigns, generate sales leads, process account collections, raise funds, administer research surveys, and conduct political and community initiatives. Outbound Call Center campaigns also help increase agent productivity, improve sales results, lower infrastructure costs and increase business agility.

Call centers around the world count on Five9's Outbound Call Center software for more profitable and productive outbound campaigns.

- Free consultations
- Free trials
- Free quotes
- Feature articles
- Case studies
- Technology briefs

<http://outbound-call-center.tmcnet.com/>



Powered by:





Verint Systems: Intelligence in Action

Verint Systems (www.verint.com) has long been one of the leading quality monitoring/workforce optimization (QM/WFO) suppliers. The company addresses a wide array of call-related needs, such as recording, monitoring and forecasting/scheduling. And its products are employed by a diverse group of users, including home agents, public safety answering points and all types of contact centers. The firm's offerings and approach can truly be described as "intelligence in action."



Customer Interaction Solutions recently interviewed Elan Moriah, president, Verint Witness Actionable Solutions and Verint Video Intelligence Solutions, on a range of key contact center and customer interaction issues and trends:

CIS: Where does Verint see the QM/WFO market going and what are the drivers from the perspectives of: (a) the demand and needs from contact centers and (b) the QM/WFO marketplace?

EM: Let's look at these in turn:

1. The demand and needs from contact centers:

Verint is seeing WFO software solutions as one such technology that continues to be a prioritized investment area among business decision makers. Especially attractive for its ability to help drive down costs, optimize resources, increase sales and heighten service quality, WFO can deliver on the quantifiable results and ROI that so many businesses today mandate in their technology decision procurement processes. Separate point systems, disparate databases and different reporting render valuable information useless because it's hidden and inaccessible, resulting in isolated decision-making. Because in years past these applications were traditionally

implemented and administered independently, they require duplicate effort and expense to install and maintain. As a result, organizations are denied a holistic view of performance and therefore come up short on effective and efficient customer service across the enterprise.

Understanding the balance between optimum cost structures and the customer experience is tricky. Yet according to a Frost and Sullivan report, "Contact Center Operations in a Down Economy – Market Insight," published in December 2008: "When the economy sours, the need to protect the customer base becomes even more pronounced. When facing a resource crunch, decision-makers need to factor more variables into their thinking – such as the potential for revenue generation from the contact center, and whether it makes sense to neglect that for short-term budgeting. They also need to consider the relative costs of customer retention versus customer acquisition, as it costs less to acquire a new customer than it does to retain an existing one, but those costs often come out of separate budgets."

This is reinforced further in Gartner's "Magic Quadrant for Contact Center Workforce Optimization" report by Jim Davies, published Oct. 12, 2009 where

it revealed that "increased organizational awareness surrounding the value proposition associated with WFO, combined with an expending set of viable vendors, is fueling market adoption."

The combination of industry analysts, along with direct feedback from Verint's customers, reinforce that many organizations are looking for a unified, analytics-driven approach to WFO suites, which deliver capabilities that can drive significant change and improvement for businesses including:

- Quality monitoring and recording
- Workforce management and strategic planning
- Speech and data analytics
- Desktop and process analytics
- Customer feedback surveys
- Performance management
- e-learning and coaching

2. The QM/WFO Marketplace

Already prevalent and proven in today's customer-facing contact centers, WFO is now stepping over into the broader enterprise to help streamline operations across branch, remote of-



fices and back-office departments that play a role in shaping customer experiences.

To improve business operations and increase organizational efficiencies, companies need to know what activities are occurring in the contact center and retail stores, as well as in behind-the-scenes, back-office departments where order fulfillment, billing and claims processing take place. Errors of inefficiencies in any one area can ripple into others – driving up call volumes, customer frustration and even attrition.

Where challenges arise is in the mix of solutions used to address service functions and workforce productivity across all these customer-impacting functions. Historically, these solutions have been deployed in separate areas of the business, providing a narrow, fragmented view of operations. And as such, they tended to involve an array of processes and even more metrics to measure and gauge success. Armed with the enterprise-enabled Impact 360 Workforce Optimization suite from Verint, businesses can share information, work together and, ultimately, deliver a better, more cost-effective experience throughout the service delivery functions within the organization.

Surviving and thriving during an economic downturn requires smart business decisions. Speech and data analytics as part of Verint's WFO suite introduces yet another impactful and powerful dynamic: One that will continue to serve as a catalyst in enhancing and shaping the WFO market in 2010 and beyond.

Speech and data analytics bring forth pivotal "moment of truth" interactions that can shape customer relationships and provide valuable insight for strengthening or recovering those at risk. Designed to help organizations develop a more thorough understanding of customers' wants and needs, these analytics tools not only help optimize customer interactions but also promote lasting and profitable customer relationships. On one hand, there is speech analytics. It combines structured and unstructured data, analyzing and identifying key circumstances that may positively or negatively impact business performance, such as the root causes prompting call volume spikes into the contact center. Add to that data analytics, which identifies anomalies that could be negatively impacting performance.

Speech and data analytics have also helped shift the emphasis of quality management from what the employees are doing to what the customers are doing. What are they saying? Are they satisfied? What can be done to fix problems? Are common calls related to larger trends? The solution can sort through thousands of interactions and pull the necessary information quickly. Going beyond the immediate and typical customer touch points, the contact center, marketing, financial and product departments can also leverage the analytics intelligence to help improve and adapt company promotions, billing statements and product/service offerings.

Other powerful analytics capabilities come in the form of customer feedback surveys and through the power of desktop and process analytics. Customer surveys capture direct customer feedback on products, processes and staff performance, while desktop and process helps organizations can gain process visibility and consistency by analyzing, managing and improving how workers across the enterprise use software applications to do their jobs. With the abilities to monitor, analyze, report and react to employee desktop activity and process workflows, companies have the tools they need to measure effectiveness, compliance and external customer impact throughout the enterprise.

CIS: There has been much talk about trends such as leveraging home agents and knowledge workers. Please tell us more about what Verint is seeing as growth and opportunity in this area and how its technology is supporting these initiatives.

EM: The contact center market is indeed evolving, and as a result, we are seeing more trends toward knowledge workers and remote agents. IP, serving as one of the greatest enablers of the virtual contact center model, is helping facilitate dynamic remote interactions by allowing access to a broad group of knowledge workers or experts who reside in different locations within an organization: often outside the contact center itself.

Verint's Impact 360 suite includes quality monitoring and recording, workforce management, customer interaction analytics, desktop and process analytics, performance management, and e-learning and coaching functionality together into a single, unified solution. Impact 360, in an IP environment, makes service delivered through home-based agents transparent to customers and outside world. It enables calls to be routed to agents working in their homes, domain experts in departments across the organization or counterparts working within a traditional contact center environment itself.

With Impact 360, agents located in a contact center now have access to experts outside their particular physical location. This is especially important if the organization needs someone with technical support skills, bilingual capabilities, or years of experience with a certain product line/offering. For example, a customer dials into the support center of its financial institution with a question. The agent knows that an employee in one of the company's branch locations can better serve this customer and handle the request in a timely, accurate manner, so the call is transferred seamlessly, and first rate service is delivered. Such structures have proven especially beneficial in the ability to deliver first call resolution, and thereby customer satisfaction and loyalty.

CIS: There is a movement to integrate contact centers and back offices, and contact centers with other departments e.g. via presence. Discuss the impacts of these trends on applying QM/WFO. What are the benefits and challenges and how can Verint's solutions meet them?



EM: Verint's Impact 360 suite is designed to help improve the entire customer service delivery network: from contact centers to branch stores and remote offices to back-office operations. It includes a multitude of new functionality across the components of its suite to help improve the customer experience across virtually every customer touch point in an organization.

Blair Pleasant, president and principal analyst for COMMfuzion, shares that view.

"Today, unified communications and IP telephony bring the concept of the 'expert agent' to life, and technologies like Verint's are necessary enablers to this vision," he says. "Calls can be routed to knowledge workers outside the contact center in order to leverage subject matter experts, who can now be scheduled, monitored for quality, and delivered eLearning even if they do not reside in the customer service department."

Impact 360 WFO is leveraged today across previously thought of operational silos. Companies can improve cross-departmental transparency and workflow to more effectively change and optimize processes, adjust staffing, and make other decisions to impact the quality of the customer experience enterprise-wide.

"Today, unified communications and IP telephony bring the concept of the 'expert agent' to life, and technologies like Verint's are necessary enablers to this vision." – Elan Moriah, Verint

CIS: Discuss the Iontas acquisition. How will its solutions enhance Verint's and, in turn, benefit contact centers?

EM: In February 2010, Verint acquired Iontas. Combining Iontas' proven desktop and process analytics software with our enterprise WFO solutions will enable our customers to realize significant gains in process productivity, efficiency and effectiveness when variability is eliminated and everyone consistently executes the same best practices in their processes. These solutions deliver process improvement value based on achieving process visibility, consistency and control in existing business processes, without the need for risky process change.

This addition, desktop and process analytics serves as an extension to Verint's WFO suite and is a natural fit with all of the company's target markets. For example Iontas solutions help capture and analyze agent/employee desktop application usage. They can trigger recording and tagging of key desktop screen information to help ensure compliance with industry mandates like PCI (Payment Card Industry). The combination enables customers to extend their technology investment from the contact center to measure and further optimize other areas of the enterprise that impact the customer experience, such as

back-office claims processing and sales and services activities in a bank branch. And in back office operations and branch locations, this technology can be used to capture employee desktop activities and manage adherence to processes, resulting in efficient forecasting, productivity and capacity planning.

DMG Consulting's 2009/2010 Quality Management/Liability Recording (Workforce Optimization) Product and Market Report projects desktop analytics will begin to see increased adoption in 2010-2011. Defined by the firm as "an automated and systemic approach to monitor, capture, structure, analyze, report and react to all agent desktop activity and process workflows," it views the desktop analytics market as a valuable component of the analytically-enabled contact center.

CIS: Outline the "Intelligence in Action" campaign. What issues does it address and how do the elements in it accomplish those goals?

EM: In early 2010, Verint launched a major initiative called Intelligence in Action in response to interest it received from executive management teams across global organizations.

Intelligence exists everywhere within a company, but framing it with meaning and putting it into action is the key. In today's economic climate: this is the difference between companies that stand out or fade away. Verint's solutions enable organizations of all sizes to make timely, effective decisions to improve enterprise performance. More than 10,000 organizations in over 150 countries – including over 80 percent of the Fortune 100 – use Verint solutions to capture, distill, and analyze complex and underused information sources.

The odds are high that the world's consumers have encountered Verint solutions before. The company's WFO software helps organizations enhance customer service operations in contact centers, branches, and back-office environments. Our software helps organizations increase customer satisfaction, reduce operating costs, identify revenue opportunities, and improve profitability. Verint solutions help address the practical needs of business and government. And they incorporate some of the most innovative, sophisticated, and reliable technology available. These solutions provide efficient insight into multiple levels and facets of a business. Whether you are an executive looking to take the business to the next level, or a line manager looking for ways to streamline daily processes, Verint solutions can help put the intelligence currently existing in or being gathered by an organization into action.

With our Intelligence in Action campaign, there are a series of programs designed to help take "intelligence" to the next level whether starting in a company's contact center or taking a full enterprise service operations approach.

Visit www.intelligenceinaction.com to read further about customer success stories, gain new ideas from third-party and Verint white papers, and get details about their special events across North America designed to address key customer service operations challenges, trends, best practices and information exchanges with peers. **CIS**

Hosted Contact Center Solutions: Setting the Record Straight

Hosted contact center infrastructure solutions are steadily gaining ground in enterprises of all sizes and in a variety of public and corporate verticals, reaching unprecedented levels of customer satisfaction because of the minimal cash outlay required, quick deployments, rapid and quantifiable return on investment, scalability and agility, ongoing investment protection, a reduced maintenance burden, and the opportunity to “try before you buy.”

IP-based technologies have eliminated physical communications constraints, empowering enterprises to be more responsive to their customers using the virtual, multi-channel and flexible servicing infrastructures of hosted solutions. Enterprises are looking for ways to leverage these new technologies, and contact center hosting is an ideal, cost effective fit.

Moreover, the new generation of hosted/CaaS-based contact center infrastructure has overcome the technical and functional limitations of older solutions. Now, the leading vendors need to correct the misperceptions that are hindering more widespread adoption of these solutions. DMG's findings identify the five top misconceptions as:

Concern #1: Hosting is only for small contact centers.

The Reality: Eight years ago, when the first hosted contact center infrastructure vendors were looking for funding and explaining their value to the market, they claimed this new business model would “democratize the world of contact centers,” delivering to smaller businesses the same benefits larger, better funded organizations gain from their on-premises solutions.

Since then, hosting vendors have continued to deliver new servicing capabilities that don't require enterprises to compromise on functionality. DMG research shows, in fact, that the typical buyers of these solutions are mid-sized customers and the majority of hosted solutions are deployed to replace existing premises-based solutions that no longer meet organizations' needs.

Concern #2: Hosted contact center solutions are functionally inadequate.

The Reality: Just as no two premises-based solutions are alike, neither are the many hosted contact center infrastructure solutions now available, each of which offers its own unique design, architecture and functionality.

As the market continues to evolve, hosted providers are moving toward a common set of capabilities and, at a higher level, a select few vendors have further taken an “all-in-one” approach, adding modules for the applications most commonly used by contact centers. With various packaging and pricing strategies to choose from, hosted providers now offer some of the most competitive and functionally rich solutions in the market.

Concern #3: Hosted contact centers solutions are inflexible and not customizable.

The Reality: Based on DMG's interviews, the opposite is true. In general, hosted end users consider their vendors and solutions to be both flexible and scalable.

A major advantage most hosting vendors have over premises-based providers is the ease with which they can offer new functionality — they simply load software and make the new features immediately available. Hosted solutions are also highly scalable and allow organizations to add and reduce users and functionality as needed to meet cyclical or seasonal volumes and pay only for as much contact center capacity as they use.

Concern #4: Hosted contact center implementations and in-

tegrations are more difficult than premises-based initiatives.

The Reality: Few integrations are easy, whether premises-based or hosted, but many hosted vendors have built their platforms using technology that's far more standards-based and open than many older premises-based offerings, making integration easier.

Hosted vendors are motivated to get their offerings up and running as quickly as possible, since they don't earn revenue until systems are in production, and especially since the majority of hosted end users choose made their purchasing decisions to avoid an expensive and lengthy implementation.

Concern #5: Hosting has a higher total cost of ownership than premises-based solutions.

The Reality: There are several reasons many CFOs now prefer to invest in hosted solutions, including no capital investment; low implementation and integration fees; scalable payments; no support costs; limited risk and obligations; and ongoing investment protection because upgrade costs fall to the vendor.

While numbers vary for every acquisition, in general, DMG Consulting has found that, in a three-year host vs. buy analysis for a contact center solution, assuming no functional (hardware or software) upgrades, no maintenance fee increase, and a minimal IT and business resource requirement, purchasing looks to be less expensive than hosting. However, if the calculation includes the cost of upgrades and a significant amount of internal resources needed to support a premises-based solution, the hosted alternative will often have a lower TCO.



Matching Recordings With Needs

Call recordings are the ores of customer interactions. They contain vital customer service support, compliance, sales, collections, and agent and supervisor performance elements, which can be extracted by live monitoring and sophisticated speech analytics tools.

Yet with every cost being scrutinized by senior management, obtaining call recording solutions entails a careful look at the solutions, suppliers and delivery methods. Therefore to make right recording choice you will need to balance your needs with your resources. Fortunately there is an expanding array of increasingly functional, affordable and flexible wares and application methods from high-quality suppliers to help you meet them.

Evolving Environments and Needs

If your contact center is moving, as many have, from TDM to IP environments including SIP trunking, you will have to switch out your old recorder, if it isn't already IP-enabled, to one that is. **OAISYS's** Talkument and Tracer call recording and interaction management solutions now integrate directly with SIP trunks to record calls. You can seamlessly capture call data directly from the trunks, including outside party numbers, start times and duration. You can also export call recordings based on pre-defined business rules, using criteria such as call durations or agents' IDs, into speech analytics applications.

If you have or plan to buy **Cisco** Unified Communications Manager, Telrex has enabled its IP-based CallRex recording software to support the solution using forked audio. With forked audio, you would no longer have to set up port mirroring within your telephony environment. A duplicate audio stream is sent directly from the Cisco IP phones to the call recording server. Alternatively you can conduct call recording with CallRex via packet-sniffing technology using Cisco's Skinny protocol.

If your firm is switching to virtual servers, which tap into available computing power across multiple servers off one hardware platform, there are recording solutions that can function well in that environment. TelStrat, for one, has adapted its Engage 3.2 solution to support Citrix, **Microsoft** Hyper-V and VMWare virtual servers.



Compliance, customer experience and quality and business intelligence reasons may be driving your organization to obtain 100 percent recording, as opposed to random call sampling in the past. Technology improvements such as less costly storage, smaller footprints and sophisticated databases now make it more practical and affordable reports Bruce Kaskey, co-founder, OrecX. He is already seeing 100 percent recording from his firm's customers.

Yet before you launch 100 percent recording you should take a close look at your switching and network environment. You may have what **KnoahSoft** president Ralph Barletta calls a "heterogeneous environment" – one made up of products from multiple vendors handling calls for centralized and perhaps including satellite contact centers and for home agents.

"Calls can flow and are managed in a myriad of different ways, each of which needs to be faithfully represented in a comprehensive call recording engine to achieve 100 percent coverage," Barletta points out.

HD voice is coming down the pipeline for contact centers as it enables greater voice range hence more natural sounding acoustics compared with that delivered over TDM. It permits agents to distinguish between similar-sounding names and syllables much easier. These features reduces talk time, call costs and boosts customer satisfaction. HD voice is also being parceled as part of a unified communications strategy.

Should your organization be planning to deploy HD voice they should factor in cost-adding network bandwidth and storage plus more complex recording capture protocols and data formats, Brian Spencer, president, OAISYS points out. His



BW 900



SH 330

Introducing the Global Headset Community

Sponsored by Sennheiser Communications

The customer service business environment changes at a moments notice. Will you be the last to know? Get up-to-the-minute news, trends and insight on critical technological advancements for your headset users at the world's premier destination for tech information.

As they say in customer service—every second counts.

Visit the community at: headsets.tmcnet.com

Powered by:





firm's products will be HD compatible as the standards around HD voice become prevalent and adopted within the market.

"Companies should evaluate the recording interfaces of their communications platforms," says Spencer. "Many offer active connections to secure media streams for recording and some will recode the stream into an LD format such as G 729 that, while not having as high a fidelity, will suffice for the uses of the call recording system and drive a lower total cost of ownership. If they don't, firms should take a hard look at the various HD voice protocols that may be in use in your network and ensure that the recording solution does or will support them all. They should press any vendors to share their data management and storage requirements based on capturing HD voice and not the optimal, highly compressed formats that present lower total cost of ownership numbers in these areas."

CallCopy avoids the storage issue, says Ray Bohac, president and CEO, by giving users the option to step down the recording quality prior to storage. If they are running speech analytics, it will fully index against the HD voice, and then run compression prior to storage, allowing users to save substantially on disc space.

**"Calls can flow and are managed in a myriad different ways, each of which needs to be faithfully represented in a comprehensive call recording engine to achieve 100 percent coverage."
– Ralph Barletta, KnoahSoft**

Compliance Standards

There are strict compliance regulations and standards that many recordings must meet. One of these is the Payment Card Industry (PCI) Data Security Standards (DSS) 3.2. It prohibits storing sensitive authentication data, including card validation codes and values, after authorization even if encrypted if that data can be queried i.e. mined. If these recordings cannot be mined, storage after authorization may be permissible as long as the appropriate validation has been performed in accordance with the standards.

There is an array of recording solutions that comply with PCI-DSS 3.2 for credit card information and which provide hardened security for other data types. dvsAnalytics' Encore Voice Recording solution does not allow sensitive data to be queried and it removes all such portions. For example, when a credit card transaction occurs over the phone, Encore detects the event and inserts tabs into the recording where the sensitive information was provided. That portion of the call can be either immediately scrubbed, or encrypted and removed later. This feature enables organizations to remain in compliance while also retaining non-sensitive information, including customer names, account numbers and call result codes.

The VPI (Voice Print International) CAPTURE PRO call recording solution uses desktop screen analytics to detect events and data directly from application screens, such as an employee entering sensitive credit card authentication data into a field on-screen and tags them to the recorded interactions. VPI CAPTURE PRO retains non-sensitive data and makes them available in interactive reports.

TelStrat ensures that the voice files used in coaching will also be encrypted. Engage Coach will be so capable in 2Q 2010; Engage Capture is already encryption-enabled.

NICE Smartcenter encrypts voice and screens as close as possible to the time of the information creation and to their physical locations to reduce potential security breaches and increase data security. Once encrypted, the media is kept encrypted throughout its lifecycle. Data is also written encrypted to local backup tapes, as well as to any NAS/SAN or CAS storage supported by NICE Storage Center.

KnoahSoft's Harmony 3.0 includes Advanced Encryption Standard 256-bit encryption to protect recorded and archived data. AES 256-bit it says is the most reliable, efficient and strong encryption algorithm available.

Harmony 3.0 also features tight integration and synchronization with Active Directory for authentication and single sign-on. There is enhanced password policy setting, including automatic expiration, syntax settings and lockouts for unauthorized passwords to protect against computer-generated password attacks and poor password selection and management by employees. It also has, in addition to sensitive data elimination, audit trail information that helps trace and block system intrusion attempts and it can watermark recordings so that no recording tampering can occur.

Deployment Options

There are several call recording deployment choices. The principal one has been either to buy these solutions standalone or bundled into workforce optimization (WFO) suites. The former supplies best of breed and could be more cost effective as you may not need all of the features in the suites. The latter offers easier integration, management and support because these components have been tied together.

The suite approach appears to be gaining marketplace traction; there are more offerings with enriched call recording applications available. One of these is Calabrio's One WFO suite, which includes two new applications: **Calabrio** Call Recording 8.0 and Calabrio Quality Management 8.0. The Calabrio Call Recording 8.0 offers a network-based recording architecture, live voice monitoring and role-based alerts. It also integrates into the Calabrio Speech Analytics.

There is another approach where recording and other WFO solutions such as quality monitoring and workforce management can be purchased and installed as easily-fit modules on an



as-needed basis. These modular solutions are offered single-vendor or multi-vendor, whose participants have pre-integrated the pieces. For example OrecX's solutions are available via modules.

An increasingly common alternative choice is premise-installed recordings versus those hosted, either by suppliers or by third-party firms. Premises-installed offers complete customization and control while hosted delivery avoids upfront capital costs and provides greater flexibility to add or subtract capacity in line with demands.

One premises-installed option is buying recording functionality bundled and pre-integrated into routing/switching platforms. Case in point: Interactive Intelligence's Interaction Recorder is built into the Interactive Intelligence Customer Interaction Center. It offers a full range of functionality including rules-based recording by entity, workgroup, role, or individual, screen recording and multimedia recording for calls, Web chats, e-mails and faxes.

Hosted call recording solutions are becoming more value-rich thanks to upgrades in their core engines. CyberTech International's CyberTech Release 5.4 enables individual tenants to manage their recording system environments without depending on or waiting for third parties. It also offers full-featured agent evaluation, improved scoring rates, extended edit periods and added report types. The release also provides central management features, such as central configuration settings and configuration backup.

KnoahSoft's Barletta cautions about acquiring vendor-hosted and switch-independent call recording solutions. He points out that trying to perform large scale hosted recording over WANs may be prohibitive from cost and performance perspectives. Instead if firms are going to have recordings hosted they should be on the same hosted platforms as the ACDs.

"A lot of contact centers want to move to IP but do not feel they have the IT knowledge to implement them and are looking for companies that have expertise," says Barletta.

Solution/Supplier Selection Best Practices

When buying and going live with call recording solutions, first, ask why you need to record (i.e. compliance, quality or risk), recommends Kaskey. Also find out what is the best and most effective way to record conversations. Then make sure the solutions can operate in your work environments. The only way to do that is to set up a test and run live.

"Demos, fancy sales literature and salespeople cannot duplicate or demonstrate how voice recording software will function in a live setting," says Kaskey.

Jim Shulkin, director of marketing at Envision Telephony, recommends looking for a supplier that offers sought-after features and sophistication who delivers them in a solution that remains very intuitive and easy to use.

"Technology capability advancements unfortunately often go hand-in-hand with heightened complication and dedicated

administration requirements," Shulkin points out. "Maintaining usability and user-friendliness while delivering the promise of today's recording and analytics capabilities, is key to organizations that don't want their new investment in recording technology to go underutilized because it's too hard to use."

Small and mid-sized enterprises (SMEs) that are looking for call recording solutions should look for those that are scaled for them but which have all the features offered to enterprises, says Tony Procops, CEO of CyberTech North America. SMEs should also seek out those who are focused and experienced on serving them rather than as "also" to enterprise customers.

Fortunately there are more recording solutions that have been designed for that market. "The price to performance ratio has shifted, allowing us to provide feature-rich, easy-to-use and highly affordable call recording solutions to these customers," says OAISYS' Spencer.

CallCopy's Ray Bohac says contact centers should be wary if a vendor does not consult with them prior to proposing a solution; one size does not fit all. Centers should focus on their specific needs and evaluate vendors based on them to avoid "functional overkill," such as being swamped with talk of unnecessary features. They should also ask vendors to speak with multiple references, ideally ones that are similar to their centers in size and implementation.

KnoahSoft's Barletta recommends that companies look for suppliers who have excellent track records for and can demonstrate affordability, flexibility, scalability and upgradability. They should also have strong integration capabilities, such as for linking recordings with external data sources such as customer satisfaction surveys and dashboards. At the same time suppliers should have a clear roadmap of where they want to go, such as social media, speech analytics and UC.

"Price will always be an issue when choosing solutions and vendors but it should be price in the context of a comprehensive suite of applications," says Barletta. "And those vendors should be conscious of, and stay on top of trends so that when these technologies are ready for prime time your vendor partner will right there with a timely offering that avoids having to consider switching vendors down the road." **CIS**

The following companies participated in the preparation of this article:

Calabrio
www.calabrio.com

CallCopy
www.callcopy.com

Cyber-Tech International
www.cybertech-int.com

dvsAnalytics
www.dvsanalytics.com

Envision Telephony
www.envisioninc.com

Interactive Intelligence
www.inin.com

KnoahSoft
www.knoahsoft.com

NICE
www.nice.com

OAISYS
www.oaisys.com

OrecX
www.orecx.com

Telrex
www.telrex.com

TelStrat
www.telstrat.com



Envision Telephony (www.envisioninc.com) has come out with a revamped version of Envision Workforce Management, scheduling, forecasting and staff adherence solution, which is part of Envision Centricity, the firm's Web-based workforce optimization application.

Envision Workforce Management offers drag-and-drop editing in real time, automatic selection and approval of vacation time and instant notifications of changes. It has Scheduling Wizards such as for specifying work habits and staffing needs to generate unlimited scheduling scenarios. Menus are highly configurable and user-friendly; they with messaging and a virtual bulletin board provide agents access to schedules. There is a robust collaboration console for communicating availability and time off preferences. There is also intraday management for monitoring and reporting agent adherence in real-time, while recognizing trends and automatically re-forecasting. The software provides forecasting and what-if scenario-building capabilities and custom reports.

Inova Solutions (www.inovasolutions.com) has released a new version of its **Inova** LightLink middleware, which powers several different reporting products such as Desktop Presenter, a desktop application that displays real-time metrics and messaging. LightLink is simpler to install by allowing the system to be preconfigured. When users log in, Desktop Presenter applications are ready to go and do not have to be individually configured on each machine. LightLink also permits authentication and messaging tied to Microsoft Windows user names rather than IP addresses. This feature improves security by only allowing users to see messages tied specifically to individual log-ins. There is also remote log-ins.

Maximizer Software (www.maximizer.com) has come out with Maximizer CRM 11 with several new features, among them:

- Support for the Firefox Web browser;
- Full marketing campaign support including action plan creation and access to the document library;
- Expanded sales force automation and business intelligence capabilities;
- New wizard-driven, easily-customized dashboards;
- Optimized usability, such as a redesigned interface and tighter integration with native **BlackBerry** applications. Real-time access to content, documents and e-mail; attachments housed in the central Maximizer CRM database;
- Multimedia support for video, voice and images that can be easily saved to a current Maximizer CRM record; and

- Mobile CRM multi-user support, which allows users to assign tasks, escalate cases and assign opportunities to other colleagues without returning to the desktop applications.

Microsoft will make available the next version of its unified communications (UC) software, code-named Communications Server 14 in the second half of 2010. The new product includes a complete communications solution, with full enterprise telephony and a sleek, simplified Communicator client that works with Microsoft Office, Microsoft SharePoint Server and Microsoft Exchange. It will feature a versatile platform that allows customers to embed communications in applications.

Communications Server "14" will permit firms to use instant messaging, presence and other software capabilities both on-premise and in the cloud with Microsoft Office Communications Online. It will for example help people find colleagues based on their expertise through a new skill search feature, understand when their colleagues are available to collaborate and, with a new location-awareness feature, where they are available. It can also easily initiate collaboration and bring together the needed content, resources and people.

UTOPY (www.utopy.com) has come out three new solutions: UTOPY First Call Resolution, **UTOPY** Handle Time Optimization and UTOPY Call Volume Reduction.

- UTOPY First Call Resolution detects any indications of repeat calls within the conversation. It also integrates all available caller identifiers and correlates that information with the actual conversation content to identify whether the call is an initial or repeat call for that caller regarding each particular issue. It then correlates repeat calls with call reasons, agents, products, processes and customers to discover the drivers, alerts organizations of these issues and recommends remedial actions. UTOPY Coaching facilitates targeted coaching on the particular topic within which deficiencies are identified
- UTOPY Handle Time Optimization automatically measures handle time by call reason, agent, product and process, determines why customers are calling and detects which types of calls use the most resources. It also uncovers policies and processes that are driving handle time, discovers opportunities to reduce the duration of those calls and recommends targeted programs to reduce the handle time while ensuring that customer satisfaction is not adversely impacted
- UTOPY Call Volume Reduction automatically and objectively classifies 100 percent of calls. It discovers root causes of unnecessary calls, such as those that could have been handled by self-service applications, or calls caused by a sub-optimal product feature or business process. It also makes the business case for changes to products, processes and self-service applications; and tracks the success of these changes over time



Varolii (www.varolii.com) has come out with Varolii Fast Solutions for Customer Service and Collections and Varolii Smart Solutions for Customer Service and Collections. Varolii Fast

Solutions for Customer Service and Collections include Varolii ID that personalizes each message to individual recipients, queue management, professional voice recordings and detailed reporting. Varolii Smart Solutions for Customer Service and Collections include all the features found in Varolii Fast Solutions, plus three more Varolii ID business rules, dynamic transfer options and current contact center activity and three more conversation types, one more voice persona, and one more language. It now has cross-channel communications and the ability to automatically connect high-customers to agents. There are also enhanced reporting.

Verint (www.verint.com) has enhanced its Impact 360 Workforce Management solution with several new capabilities for contact centers and back offices. These include:

- Time Banking, which models and tracks of annualized hour banks mandated in employee contracts by government labor laws and Time Off Accrual, which allows detailed and flexible modeling of rules associated with how employees accumulate vacation time. It also helps validate and process time off requests.
- Work Item Tracking, which simplifies set-up, viewing and drill-down into workloads by age of individual items.
- Linked Queue Forecasting, which expands on existing multi-queue forecasting by defining linkages based on workflow from one queue to the next.
- Pre-defined Key Performance Indicators and corresponding reports are now available to address the most common measures of back-office performance.

The Impact 360 suite also supports compliance with Section 508 of the U.S. Rehabilitation Act of 1973, benefiting individuals with disabilities

and Job Access With Speech, a software program created to eliminate barriers in information technology.

Oracle Contact Center Anywhere

◆ **FREE 30 DAY PILOT** ◆

◆ **FREE QUOTE** ◆

◆ **FREE CONSULTATION** ◆

➤ **Contact Center Anywhere Virtual Software**

- Multimedia ACD – Skills Based Routing
- Interactive Voice Recognition - IVR
- Blended Inbound/Outbound - Predictive Dialing
- 100% Call Recording – Remote Call Monitoring
- Computer Telephony Integration CTI Screen Pops
- Multi - Site/Multi - Tenancy
- VoIP (H.323 and SIP) - PSTN Calls

➤ **Flexible Deployment Options**

- Cloud (SaaS) or On-Premise

➤ **Easy Integration Add Software**

- Workforce Management
 - Monet WFM
 - IEX TotalView
 - Verint Impact 360^o
- Customer Relationship Management
 - Salesforce CRM
 - Siebel CRM
- Informavores Firefly Call Scripting
- Voxeo Voice Recognition

◆ **Free 30 Day Pilot Program** ◆

In the customer care and call center industry, technology upgrades are expensive and conversions risky. Promero's FREE Pilot Program is neither expensive nor risky. Contact Center Anywhere is compatible with legacy systems or operates as a standalone. Try Oracle's world class Contact Center Anywhere SaaS virtual contact center software Free for 30 days.



Promero, Inc
888.204.0822
954.935.8800 Option 7
sales@promero.com
www.promero.com

◆ **Promero . . . providing call center solutions since 2001** ◆

1100 Park Central Boulevard • Pompano, Florida 33064

eDiscovery, FRCP and Call Recording

In his "On the Record" blog, Brian Spencer of OAISYS writes:

Electronic records discovery is a major burden that has been placed squarely on all businesses. Through the Federal Rules of Civil Procedure (FRCP), businesses of any size are required to provide all electronic records related to a suit or face draconian sanctions as opined by John Bace, research vice president at **Gartner**, Inc. (www.channelprosbmb.com/article/16270/E-Discovery-Is-for-SMBs-Too/).

If a business cannot produce the requested documentation its only hope to avoid penalties is to show that it has good

document retention policies in place and that they were followed in a routine, good-faith manner. Good luck to you trying to make that case as I imagine the standards being vague and interpreted differently across judges and jurisdictions.

Call recording seems to be a sticky wicket here in that if you have electronic recordings of telephone calls you may be required to share them during proceedings. I agree, if you are concerned that your business is in the wrong this can be a threat.

I see this entirely from the other perspective, however, if you run a tight ship.

Sure, from time to time I listen to a call and cringe. Rarely is it to do with a potentially litigious situation. More routinely, someone simply did not go above and beyond to elate a customer. If it comes to e-discovery as we prepare for a suit, I'll risk that a customer service call was not us at our best in order to protect us from unfulfilled promises by the other party.

Visit Brian's blog at <http://blog.tmcnet.com/on-the-record>

Hosted versus Premises

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

The hosted PBX model is more about total cost of ownership and business productivity particularly today with our tech-heavy needs in business and our increasingly mobile human resources.

Mitel does indeed offer a hosted PBX service. And I believe that Avaya either has one or bought one through the **Nortel** purchase.

We have a mobile workforce today. Everything is going cloud. You need access to the phone system, e-mail, apps, data, CRM, etc. Not much of that is premises-based anymore. It is being pushed to the cloud by many, many companies in the Web 2.0/Business 2.0 space.

And if it was premises-based, who would keep it updated, secure, backed up, etc.?

Final note: unless the business is buying an Interactive Intelligence PBX or a top-of-the-line \$150,000-plus PBX from the Big Three (Avaya, Mitel ShoreTel), the company isn't getting all the functionality and features available via most hosted PBX models.

There are folks that do hosted PBX poorly, but there are certainly companies that do hosted PBX well. The business continuity/disaster response aspect of a hosted PBX solution also adds a benefit to the mix that premises-based can't duplicate.

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

SYTEL LIMITED EXPANDS TO U.S.

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

Sytel Limited is a company with a strong dialer and scripting engine that is expanding into customer service, media blending and more recently, the U.S. As more customers look for SMS support, **Sytel** allows these short messages to be integrated into the contact center seamlessly with e-mail and calls. With open APIs, Sytel touts openness as an area where it excels.

The U.K.-based company says its service and support is a true differentiator and as an employee-owned organization, they expect to continue their growth in the US through partnerships and organic customer acquisition. Oh and there is a **TMC** scoop here – there is no IPO planned for a long while.

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

REGUS

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

Employees in a recent Regus-sponsored survey reported in the *Dallas Business Journal* said sure, they appreciated having jobs, but they needed them to be in "a flexible work environment" to "counterbalance stress."

Regus sells flexible office suites and virtual office products. Jeffrey Doughman, a regional vice president with Regus, says employees "more than ever, desire workplaces that offer flexibility for them to be productive."

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



Upcoming **TMCnet** Webinar Schedule

May 18, 2010 • 12:00pm ET/ 9:00am PT

Listen to Your Callers: Understanding Key Call Metrics to Increase Caller Satisfaction and Business Efficiency

Sponsored by:



<http://www.tmcnet.com/webinar/angel-dot-com2>

May 25, 2010 • 2:00pm ET/ 11:00am PT

Voicemail-to-Text: the Killer App for the PBX and Small Business Communications Services

Sponsored by:



<http://www.tmcnet.com/webinar/yap>

May 27, 2010 • 11:00am ET/ 8:00am PT

The Future of Mobile Communication - LTE

Sponsored by:



<http://www.tmcnet.com/webinar/radvision/lte-the-future-of-ims.htm>

May 26, 2010 • 2:00pm ET/ 11:00am PT

Voice Quality in SIP-based Networks: Assuring a Positive Customer Experience

Sponsored by:



<http://www.tmcnet.com/webinar/empirix2>

Archived • View Today!

Beyond SIP Trunking: Unify the Enterprise

Sponsored by:



<http://www.tmcnet.com/webinar/xo-communications-broadsoft>

Archived • View Today!

Learn how to Drive Revenue, Increase Profit Margins, Reduce Costs, and Build Your Subscriber Base

Sponsored by:



<http://www.tmcnet.com/webinar/ivr-technologies>

45792356424024579

54621578542466244



Tuning In to Multiple Channels

Multichannel and cross-channel contact center communications have long been more in theory than in reality; single-channel live agent or IVR calls still rule. Yet there are now signs that this is changing. Companies are finally realizing that enabling “zero outs” on automated voice solutions and ready access to phone numbers on-sites generates more revenue by keeping customers than what they save by trapping them in self-service. The next generation of consumers is using SMS more rather than voice but want that option to call.



We contacted several leading expert firms to get their insights on multi/cross-channel communications and asked them questions on topics such as:

- Multi/cross-channel communication demand and trends
- Key drivers
- Implementation challenges
- Best practices to leverage and enable successful multi/cross-channel interactions

Aspect (www.aspect.com)

Serge Hyppolyte, Director of Interaction Product Management

We certainly have seen more contact centers use channels like SMS or e-mail to contact their customers proactively. We're getting more demand for SMS notifications and for e-mail notifications in order to be connected as part of a broader engagement process the contact center wants to do. They are definitely utilizing cross-channel communications due to the fact that they are using multiple channels is indicative that they realize the customers are engaging them more with mobility than just being on the phone. If they can satisfy the customer needs without having to get on a voice call with the agent then that's less expensive for contact center and preferable. And at that point, they always have the option to change to high touch agent communication.

The adoption of multiple channels is certainly less than anticipated in North America though. You can see these customer interactions leveraging these technologies more so in other areas of the world, but not so much in the U.S. For example SMS is common in places like Asia. And, while adoption is a bit slower here than we anticipated, we realize it can just be an effect of the broader economic climate. We certainly see this growing, however.

The channel I see lagging is chat and that is because it is being replaced by instant messaging (IM). With the combination of collaboration and IM, we are seeing this grow in popularity through customer Web portals.

The key drivers to multichannel, including cross-channel communications, are first and foremost, consumer preference and consumer flexibility. Businesses need to react to the fact that more and more subscribers are now mobile. The second driver why people are looking at multichannel is cost savings. Multichannel is less expensive than voice and if they can engage in a less costly fashion, that makes financial sense for the contact center.

The biggest challenge for contact centers is how to adopt multichannel as part of their core business process from a technology and process perspectives. A lot of contact centers have traditional technologies like ACDs and less software-centric products. They have rules that optimize business processes throughout customer calls on the phone, but don't have the same rules [and training] for other channels. There will be a lot of questions. They will need to figure out what is the policy for how to handle e-mails including who gets them and does an agent have access to them.

To leverage and enable successful multi/cross-channel interactions do it slowly and identify different channels. Start one that you want to rollout of the business and optimize your processes to be able to handle that channel. Take social media, for instance. Maybe you determine how to respond to the fact that your customers are commenting about your business on Twitter or Facebook. Maybe use a number of agents that have the right skills: the ability to effectively communicate through text. Find those agents and have them participate and train them how to best respond, including how to monitor what is said, and importantly, what their responses should be to the various types of questions.



The businesses that take a methodical approach and identify a team or specific process that will measure effectiveness, and can align that process from a customer perspective, are the organizations that will see the best results. If they believe that they can adopt IM, social media, SMS and e-mail management and drive that change through the contact center without that approach that's a less successful and realistic proposition.

eGain (www.egain.com)

Anand Subramaniam, Vice President,
Worldwide Marketing

Contact centers are definitely using more channels than in the past and so are consumers and business customers. Customers often switch channels during the same interaction or across multiple steps that might be involved in long-lived interactions.

While businesses have started providing customer service through multiple channels, industry research continues to show that communication silos still exist, putting the burden on customers to recreate context as they go from one channel to another. In fact, 2010 mystery shopping research from eGain showed that over 70 percent of leading U.S. companies provided "poor" or "below average" experience in multichannel customer service. Moreover, in a cross-channel experience evaluation of 16 leading companies in four industry sectors by [Forrester Research](#) in 2009, none of the businesses received a passing grade.

The ubiquity of the Web, rich interactive technologies, generational preferences, consumer mobility and new phenomena such as social networking are driving the need for not only providing customer service through multiple channels but also retaining context and continuity across channels and interactive sessions. Moreover, complex transactions often involve multiple channels of communication. For instance, a loan application or shopping transaction may originate on the Web with self-service research, followed by a concurrent phone and co-browse interaction with an agent, and finally end in a retail branch office. Or a field service request may originate on the Web, continue on the phone and end with field service.

The customer experience across systems and agents in these channels remains fragmented and inconsistent in many organizations since customer communications, knowledge bases, business rules, workflow, business policy and interactive practices continue to remain in silos. These silos proliferate and deepen when businesses take a short-term "point approach" in adding new channels, and this includes new channels such as social. In fact, our 2010 mystery shopping research found that there were content, policy and process inconsistencies even across agents in the same channel. This could hurt not only customer satisfaction and revenue for the organization but also its brand.

Originally advocated by Gartner, the Customer Interaction Hub (CIH) is a strategy and framework that unifies customer communications, knowledge bases, workflow, rules, analytics and administration in one common foundation for managing customer interactions. The CIH approach eliminates communication silos, strengthens the interactive memory of organizations and improves

customer experience, while driving down operational costs and total cost of ownership for customer interaction management systems. Even if contact centers are not ready for a "big bang" unified implementation of a multichannel CIH, they should use this approach for incremental implementations as well. This will allow them to start with the immediate channels they need and simply plug additional channels onto the CIH platform to future-proof their multichannel customer service strategy, as communication channels come and go.

InfoCision Management Corporation (www.infocision.com)

Ken Dawson, Chief Marketing Officer

Contact centers that want to be competitive in today's market must expand their service offerings to include multiple channels for customers or donors to connect. Customers call the shots now and direct marketers better know how they want to be communicated with.

The phone is still the most preferred way consumers choose to communicate: the one to one personal touch of speaking to a live person will remain strong even with the advent of new technology. However, coupling the phone with other channels is necessary to stay competitive.

"The ubiquity of the Web, rich interactive technologies, generational preferences, consumer mobility and new phenomena such as social networking are driving the need for not only providing customer service through multiple channels but also retaining context and continuity across channels and interactive sessions." – Anand Subramaniam, eGain

In the past, businesses were limited to traditional mass marketing by equipment and cost constraints but that's no longer the case. Advances in technology have made it feasible and cost-effective for companies to develop a one-to-one marketing strategy.

Being able to integrate traditional channels with emerging channels through a multichannel marketing strategy is taking the marketing mantra "reaching the right person, with the right message, at the right time" to the next level. Many consumers are using communication channels interchangeably – e-mail, text, phone, online – which is posing an ongoing challenge for marketers because you want to be able to ensure a consistent brand experience no matter what the channel.

If a company is going to initiate a multichannel campaign they need to leverage data collected. And, there have been great advances in how this information is used, especially in the contact center environment. Prebuilt models or consumer scorings allow changes to product or up-sell offers, for example, to be made on the fly.

As more channels emerge, providing marketers and consumers more ways to communicate, cross-channel marketing is going to become more critical when it comes to a positive consumer



experience. One challenge we're faced with is the siloing of budgets – marketing has their budget, contact centers have theirs, direct mail theirs, etc. – and there is no incentive to work together to push toward a common goal. Because of this the left hand doesn't know what the right hand is doing. To have a successful multichannel strategy, all parties need to work together toward a more collaborative relationship.

To be successful, companies need to have a more complete picture of who the consumer is, what they'll respond to and how they prefer to communicate. By improving the quality of the consumer experience, the consumer will form a stronger bond with an organization. [To accomplish this], marketers need to do a customer deep dive and gather the information that will help them get to know who they are targeting. Once the data is collected, they must create profiles. The profiles will help marketers match the right message with the right consumer and determine the most effective way to get that message out, whether it's e-mail, phone, text or any other channels.

Marketers must be careful not to pigeonhole consumers into one channel. People flow between channels and having the flexibility to customize solutions is key. One size does not fit all anymore.

"The phone is still the most preferred way consumers choose to communicate: the one to one personal touch of speaking to a live person will remain strong even with the advent of new technology. However, coupling the phone with other channels is necessary to stay competitive." – Ken Dawson, InfoCision Management Corporation

Interactive Intelligence (www.inin.com)

Rachel Wentink, Senior Director, Product Management

We have clients that have customers who will escalate from self-service on the Web to live Web chat, or do the same with e-mail response management, where the system auto-responds and if the customer has another question, the follow up e-mail can be routed to a live agent. For non-escalated issues, at the moment it still seems as though people are staying within a single channel. For instance, the customer uses e-mail to interact with an agent, and stays with e-mail throughout the exchange unless a serious problem arises.

The key driver for handling multichannel is to serve customers in their channel of choice. Here's an example: if I'm traveling outside the U.S., interacting via e-mail or Web chat is preferable to me rather than a phone call. If my travel arrangements need to be changed, I don't want to attempt an international call into a queue on my cell phone because of the costs, especially the cost of waiting in the queue. But if I'm online, the cost of waiting for the Web chat, or to turn around an e-mail, is much more reasonable.

Also, for younger consumers, serving them with channels beyond the telephone can be a way to engage them further with your organization. SMS use is on the rise, and in some studies, we see consumers in their teens and early 20s preferring texting over calling. Contact centers who only take interactions over the telephone seem hopelessly out of date to this generation. For a single interaction "thread," we see channels change if the issue is serious. For instance, I start with SMS, realize you've lost my order, and now I call to follow up. Normally within a single thread, people stay within a single channel.

Many organizations continue to treat e-mail as a "pull" mechanism instead of a "push." For some groups that may be successful, but in many we hear about more complex requests, or requests from unpleasant customers, which will sit in the bucket for weeks or even months because no one wants to take those on. A push mechanism like what an automated distributor does for calls (ACD) will ensure that items don't get neglected.

It's important to recognize that customers won't accept poor service just because the channel is written rather than spoken. Contact centers need to ensure they provide good service levels for e-mail, Web chat and for SMS.

We feel an all-in-one [integrated multichannel] approach is a best practice because you can spot the points where customers change channels. They can be escalation points, which can highlight areas of weakness that the organization needs to improve. It also enables you to see patterns where customers choose one channel over another based upon their circumstances and perception of your service. Surveying them to find out why they make the choices they do can also uncover areas of opportunity – perhaps enhanced services, as well as other areas that need work. If calls are handled in a system separate from e-mail and/or Web chat and SMS, it is harder to put the overall picture together.

OAISYS (www.oaisys.com)

Brian Spencer, President

We are seeing minor gains in contact centers asking for multichannel solutions. I do not think many SMBs yet see alternative contact channels as being a formal part of contact centers and are still managing those interactions using separate technology and sometimes even staff. Of those pursuing integrated, multichannel solutions, I see a very small percentage wanting to give agents the ability to transition the contact state from one channel to another seamlessly; they still rely on telling customers to take some new action rather than creating the transition for them.

Businesses need to service their customers in a fashion appealing to their customers. Today, business-to-business interactions are still very comfortable via voice and e-mail channels, both of which are mature technologies and processes. I think business-to-consumer communications is going to be the vanguard of new interaction trends. Many self-help solutions are widely used and successful. I think when a customer decides they need personal help they still prefer the assurance of talking to someone because it is a real-time interaction. Nobody wants to hope that their vendor will reply in a timely manner if the issue carries any degree of urgency.



Call Center Software Online Community

<http://call-center-software.tmcnet.com>

In today's complex global environment of new technology, product sourcing, and labor markets, Five9's call center software is at the forefront of accelerating call center performance.

The Call Center Software community addresses issues important to decision makers in the call center market. Visitors can find valuable resources such as free product trials, feature articles, white papers, industry news and free consultations.

**Five9 call center software
applied to your operations
delivers high-impact results for:**

- ❖ Customer service and support
- ❖ Call center virtualization
- ❖ Sales generation activities
- ❖ Customer insights and experience
- ❖ Business continuity options

Powered by:





One of the huge issues is trust. As a consumer, I need to trust that my vendor prioritizes my satisfaction enough to reply in a timely manner with a pleasing resolution. During a call, a customer can negotiate, argue and escalate. This becomes far more difficult and time consuming through a nameless, faceless channel of communication.

Show as much or more dedication to rapid response and customer-friendly resolutions in asynchronous channels [i.e. e-mail] than you do real-time channels. Convince customers through action that you will reward them for using asynchronous channels and not by charging for real-time interactions but by giving great service and positive outcomes. The technology implementation needs to support these drivers.

Vertical Solutions, Inc (VSI) (www.vertsol.com)
Kris Brannock, Vice President, Corporate Development
Contact centers definitely are expanding the number of customer interaction channels for one simple reason: customers are demanding it. They want to be able to interact with the company via their channel of choice, be it telephone, e-mail, live chat, social media or self service.

Cross-channel communication is expanding, due to both the increase in agent familiarity with channels such as self-service and chat, and the seamlessness in which CRM solutions enable you to interact among the channels. This is especially true with an almost urgent need to employ the social media channel where, for example, "listening" for context-specific Tweets regarding your company and/or products has become a high priority for many executives.

I had not expected the huge surge of interest in employing the social media channel within an organization or the urgency surrounding it.

Contact centers can gain a lot of benefit from multichannel integrations, both in terms of improving customer relations and streamlining internal communications. [They] gain the ability to engage with the customer in any way that works best for the customer, and to use those channels to build communities.

Contact centers must deliver consistent answers to customer issues no matter how they are received – e-mail, phone, chat – but delivering on that is not as easy as it sounds. Each channel must trigger the same set of responses to a specific issue, not only in terms of information provided to the customer, but also for actions taken internally upon the receipt of this information. This is challenging enough for entirely internal or outsourced centers, but is particularly difficult for hybrid contact centers that use a mix of in-house and external providers to manage customer interactions.

This is where technology and integration come into play. Each channel must access and integrate with internal business applications and databases – including billing, entitlement and knowledge bases – across all providers, both internal and outsourced.

This level of integration traditionally required extensive custom development, but newer technologies use business process management and reusable drag-and-drop integrations

within these workflows to ensure streamlined interfaces. This approach also keeps costs low by eliminating the vast majority of the custom development required to establish the right integrations and connectivity between applications.

"Contact centers can gain a lot of benefit from multichannel integrations, both in terms of improving customer relations and streamlining internal communications. [They] gain the ability to engage with the customer in any way that works best for the customer, and to use those channels to build communities."

– Kris Brannock, Vertical Solutions, Inc.

To be successful [in deploying multichannel communications], contact centers must deploy the right technology that enables them to deliver consistent responses across all channels, and that enables them to maintain tight integration between channels and with internal business applications and databases.

For contact centers entering into the social collaboration arena, executive buy-in is key. Coupled with that, contact center management must be tasked with the ability to hire or move particular individuals into the social support team who are experts in navigating social networking avenues (Twitter, LinkedIn, Facebook, etc.). These contact center experts must be able to act quickly in real-time situations. They must be able to communicate to their customers in a casual written style, exude empathy and show passion for the needs of their clients through these avenues.

We also strongly encourage contact centers to review all business processes prior to deploying technology. The best technology applied to a poor business process won't improve the outcome; it will just automate it. It's important to find a contact center technology that makes it easy to create and update workflows and business processes – particularly those that don't require a lot of external programming – to keep all channels of the contact center current. **CIS**



SUN KNOWLEDGE
ONE WORLD ONE SUN

Experienced Provider of Health Process Outsourcing Services for Medicare/Medicaid, Managed Care & PBM Operations, with immense expertise in MAPD & PDP Industry.

■ **Our Service Offerings include:**

- Disease Management
- Medication Therapy Management (MTM)
- Coverage Determination (PA/ ST/ QL)
- Claims Processing
- Customer/ Provider Support
- Enrollment Services
- Provider Credentialing
- Language Interpretation Services

■ **Guaranteed Savings of 50-70%,** by Partnering with us

■ **Also seeking Leads & Business Contracts** from US Healthcare Industry

For more information, please email at: jd@sunknowledge.com



cost

quality

service

ROI

performance

**Tough
times call
for proven
solutions.**

staffing

sales

Analytics

Coaching

Customer Surveys

eLearning

Performance Management

Quality Monitoring

Recording

Workforce Management

Cost. Performance. Staffing. Service. When times get tough, your contact center may be forced to make hard decisions that could impact every area. But you don't have to make them alone. Verint® Witness Actionable Solutions® offers proven **workforce optimization** software and services that can help you get the most from your resources, drive down costs, and improve performance. For example, our Impact 360® Workforce Optimization solution helped a leading communications provider increase revenue generation in its contact center by 50 percent, even with a 30 percent decrease in staff.

Master the challenges of delivering service in today's economy with our unified, analytics-driven, enterprise-enabled **workforce optimization** solutions. Visit verint.com or call 1-800-4VERINT.

VERINT®

WITNESS ACTIONABLE SOLUTIONS®



Widening the Quality Focus

Quality monitoring is no longer just for taking snapshots on compliance and periodically checking on how agents interact with callers to keep them on their toes. It is about ensuring performance across the entire range of customer interactions whether service, support, sales, fundraising and collections and over multiple channels. This shift will require though adjusted and new QM methods to accomplish that goal that will pay off in the end.

“Quality monitoring is undergoing a major philosophical shift,” explains Brian Spraez, marketing manager of NICE Systems Solutions. “It is moving from a strict focus on agent performance towards a more holistic focus on business performance. This is evidenced by a growing trend of selecting interactions for evaluation based on business-related issues such as operational efficiency, regulatory compliance, customer experience and revenue generation. Aligning the quality process with business objectives increases the return companies receive from this investment.”

Patrick Botz, vice president of solutions marketing at VPI (Voice Print International) explains that with this QM systems need to evaluate quality from the customers’ perspectives. If a customer called three times about an issue, the QM tool should consolidate the interactions to review and evaluate the entire customer experience across multiple communication channels, even if this experience included three different agents.

“Quality is taking on a broader definition: it is not just about agent skills, but also about how the contact center is performing its business function and how it is supporting customers,” says Botz. “Customers want their transactions handled promptly and efficiently and they expect a branded experience. Agent

skills and attitudes are important, but must be evaluated in context of systems, processes and other elements that are involved in the customer experience.”

QM to Surveys and Analytics

Enabling improved customer experience is tacking surveys onto QM. Customers are increasingly being surveyed after the interactions are completed while they are still on the lines to capture information from these experiences while it is fresh. The customer feedback is then taken into the QM process.

“You’ve now got access to both the supervisors view via call playback and the customers view via their survey responses so by putting both together organizations can obtain a more balanced and rounded QM score,” explains Jim Davies, research director at Gartner.

Kristyn Emenecker, director of solutions marketing, Verint Witness Actionable Solutions, says connecting customer feedback surveys to internal QM reviews of the very same call provides perspective and focus to better understand the meaning of quality from the customers’ perspectives.

She also sees more involvement by other departments in QM. For example, having marketing managers comment on calls generated by a new campaign, or product managers on the handling of



specific product questions enriches the QM process and the QM evaluators’ knowledge base.

Also providing key insights for QM purposes is using sophisticated speech analytics tools to mine information from recordings. The data captured via them is being blended with surveys and live monitoring evaluations.

Aspect Product Market Manager Kathy Krucek explains that firms will often want to know how often and in what context are competitive products or vendor names being mentioned by their callers to see if there is high churn and why. They also want to know how effective their marketing campaigns are and whether agents are up-selling when they should.

“This information along with agent and interaction quality is all valuable to managing overall business goals,” says Krucek.

Speech analytics have another key benefit in QM: they enable greater supervisor efficiency and productivity.

“Our [contact center] customers want to spend more time providing feedback and coaching their agents rather than manually picking recordings for playback and scoring,” explains Krucek.



Coaching

The increased customer experience focus has made agent coaching even more critical to ensure customer satisfaction, and revenues. To enable this, Gartner's Davies is seeing more contact centers deploy messaging tools to permit coaches and supervisors to reach out to agents immediately after live monitoring their calls while they are fresh in the agents' minds. The messages could say, for example, "great call but don't forget to do A, B and C in that future."

Jim Shulkin, director of marketing, Envision Telephony, is seeing what he calls "the seeming resurrection of coaching." Coaching as a key function of quality monitoring first came en vogue nearly 10 years ago, so it's not new, he points out. But sometime along the way, as the demand on centers has grown and the resources to manage them have been reduced, "coaching has somehow gotten a little lost as a critical QM component in many centers."

Also, supervisors are typically bound to often legacy standards for a specific number or range of calls per agent that they must review and perform evaluations on per month, explains Shulkin, yet in many cases, it's all they can do to complete a fraction of those. Far too often the evaluations gets pushed out to the last minute in the last week of the month; supervisors then scurry to dig through hundreds, even thousands of recordings to find ones that meet the appropriate criteria to evaluate and they must burn through the evaluations just to get them in.

"This cycle leaves little time for actually paying off the process of monitoring and evaluating by augmenting ongoing training with automated and timely coaching at the agents' desktops," says Shulkin. "Fortunately, this best practice [monitoring and evaluating] appears to be making a comeback. Today's economic climate simply won't allow centers not to leverage every possible opportunity to improve agent performance and effectiveness and fewer physical resources on hand to deliver a comprehensive continuous improvement and coaching program."

Aspect's Krucek is also seeing coaching and performance management becoming core components of the quality assurance process.

"Traditionally, recording/quality management products were viewed primarily as call loggers with some basic functionality available for evaluating agents," explains Krucek. "That has greatly evolved over time with more sophisticated scoring and coaching features added out of the box for managing performance and providing automated feedback. Quality scores are being integrated with other key performance indicators in centralized dashboard views. A greater focus is also being placed on using quality scores from customer feedback surveys as part of managing the overall customer experience."

To make QM-based coaching effective, Krucek recommends that the scorecards typically used during the evaluation process should always consist of objective criteria that align with the organizations' goals and focus on specific behaviors that should be rewarded or altered.

"Supervisors should provide immediate feedback – as close to the actual interactions as possible – to either reinforce excellent behavior or correct issues before they are repeated," says Krucek.

At the same time, contact centers need to get agents involved in the quality process. Agents should be encouraged to listen to their own recordings to score themselves using the same criteria as the supervisors or managers would use to score them to get agent buy-in for the criteria being used to assess quality.

"This technique puts agents in the shoes of those who are evaluating them and it also gives agents a deeper understanding of the scoring criteria and what objectives are being used to evaluate the quality of their interactions with customers," explains Krucek. "Agents can even provide input for future scorecard form redesign by pointing out any relevant criteria that may have been omitted that they feel is important and why."

"Supervisors should provide immediate feedback – as close to the actual interactions as possible – to either reinforce excellent behavior or correct issues before they are repeated."
– Kathy Krucek, Aspect

Multichannel QM

With customers utilizing a widening array of channels: automated voice and Web self-service, e-mail/SMS and social media in addition to live agent voice there becomes a need to integrate interaction capturing and monitoring to provide a complete view of these engagements.

"Consumers are interested in a seamless experience," says Emenecker. "They simply don't care that your Web site is temporarily offline or that your live agents are only available until 5 p.m. Processes must be in place that can near seamlessly move the customer from one channel to another: giving them the options they want at the time they need them."

Aspect's Krucek is seeing increased interest in multichannel interaction capturing and monitoring. This includes recording interactions while the customer is in the IVR, monitoring that interaction in real-time after the caller is transferred to an agent and subsequently record that call either through system settings/rules or on-demand. Many of her firm's customers are also monitoring and recording e-mails/chats/Web interactions with some of them beginning to show interest in tracking SMS engagements.

"The true value comes from being able to link all of this activity together so that organizations can efficiently and seamlessly play back these interactions and evaluate them for coaching," says Krucek.



For QM on text-based channels: chat, e-mail and SMS, Gartner's Davies points out there is a difference between overall screen recording, which most suppliers offer now, and treating them as separate channels and analyzing these text-based interactions through dedicated text mining tools. Suppliers will begin offering integrated screen-capture/text mining products beginning sometime this year.

There is also as of yet no vendor-provided QM integration between live agent and automated interactions, either via IVR or Web self-service. When customers try to find information they would often go online, but if they couldn't find it they would call the contact center but would often end up first in the IVR and if it could not supply them what they want they would zero out to live agents. While that is one experience for the customers, says Davies, for most businesses that would be three different sets of technology, reports, and insights.

"The tools available to not just train on those interactions, but also include them in the analytics used to gauge customer overall experience are still relatively immature, but will also further evolve as these interactions become a bigger part of how centers communicate with customers."
– Jim Shulkin, Envision Telephony

That too will change, he says, in the next couple of years. There are suppliers who are developing tools to bring all those views together to get one single view of that experience.

Aspect recently enhanced its real-time monitoring along with providing IVR recording that links IVR interactions to agent interactions. The firm will be adding enhanced scoring features that allow for multi-channel evaluations including back-office type tasks.

Envision's Shulkin is seeing interest in and is observing that monitoring multi-channel interactions gaining momentum, coupled with developing agents' skills to be able to better handle non-voice customer interactions.

"The tools available to not just train on those interactions, but also include them in the analytics used to gauge customer overall experience are still relatively immature, but will also further evolve as these interactions become a bigger part of how centers communicate with customers," says Shulkin.

Cost Control

As QM needs and requirements become more complex, contact centers continue to face cost constraints that may limit the ability to buy these solutions. Recognizing this, Gartner's Davies is seeing an array of cost-managing lead-time-reducing

QM solutions options being offered. Top tier suppliers are launching more lightweight, easy to deploy versions of their solutions such as express versions while offering professional services to shorten deployment cycles. Meanwhile second tier companies are supplying robust QM tools with fewer "bells and whistles" at half the cost of top-vendor-provided products with much quicker implementation.

The QM tools from both types of suppliers are being offered increasingly in workforce optimization (WFO) suites. This method reduces IT costs while enabling easier and more intuitive applications.

"There is an easy value proposition linking QM with surveys and speech analytics as they really do dovetail each other quite nicely," says Davies. "There is also value in linking QM with workforce management. For example you can drill from the schedule adherence screen into call recording to find out why is this agent out of adherence. If you can listen to the call you can find out that that they were talking to an irate customer. You can also schedule coaching sessions, and preferential shifts based on quality scores."

Shulkin says going to a thin-client Web-based architecture in Envision's Centricity platform for all of the firm's applications reduced the costs to deploy, maintain and update the tools.

"Reducing not just upfront costs but the total cost of customer ownership should be a primary objective for any vendor as it is a far more salient factor in business-casing enterprise-level solutions than upfront costs alone is today," says Shulkin.

Aspect's Krucek reports that her firm's customers are looking for ways to reduce their hardware costs by leveraging virtual machines, terminal servers and software-based recording, as well as optimizing storage space required by recorded files and metadata.

Aspect has enhanced the archiving capabilities in the PerformanceEdge Quality Management product to allow for additional levels and tiers of storage. This enables organizations to go from the most efficient modes of file storage, which are faster but more expensive, for storing their most recent recordings to less expensive modes of storage for older files that are not going to be accessed as often but that may need to be stored for compliance or historical purposes.

"It's important for recording/quality management solutions to provide flexibility in this area and around various archiving and storage strategies that allow customers to reduce their hardware footprint and total cost of ownership," says Krucek. **CIS**

The following companies participated in the preparation of this article:

Aspect
www.aspect.com

Envision Telephony
www.envisioninc.com

NICE
www.nice.com

Verint
www.verint.com

Voice Print International (VPI)
www.vpi-corp.com



INTERNET TELEPHONY Conference & Expo

ITEXP

www.itexpo.com



October 4-6, 2010 • Los Angeles Convention Center
Los Angeles, California

- VoIP
- Video
- Unified Communications
- Smart Products
- Cloud/Virtualization
- Wireless...

The World's Communications Conference

The industry's best-attended event attracting thousands of communications professionals seeking new partners and the latest information

The One Event For:

- Enterprise/SMB
- Government Agencies
- Service Providers
- Resellers
- Developers

Diamond Sponsors:



Supported By:





'Customer Interaction Solutions' Magazine's 11th Annual CRM Excellence awards, Part 1

For the 11th consecutive year, the editors of Customer Interaction Solutions dared readers to prove that their companies have what it takes to win the coveted CRM Excellence Award. Below is Part One of the winners list — the companies that offer the best and the brightest customer relationship management products and services, all to the benefit of their clients. Winners were chosen on hard data: quantifiable results that convinced us, without a doubt, their clients were infinitely better off with these companies' products and services than without.



Congratulations to the winners!

EDITOR'S NOTE: Because of the very large volume of award applications we received, the CRM Excellence Award winners will be presented in two parts; Part two will appear in the June 2010 issue of Customer Interaction Solutions. More information about winning companies and their products and services may be found at www.tmcnet.com

Allegiance, Inc.

Allegiance Engage Platform

Alloy Software, Inc.

Alloy Navigator

Ameridial, Inc

Call Center Services

Aplicor Inc.

Aplicor Enterprise

Art Technology Group (ATG)

ATG Click to Call

Confermit

Confermit Horizons

Consona Corporation

Consona KDS v1.0

Cross Country Automotive Services

iPhone Application for Mazda Roadside Assistance

Envision Telephony

Envision Centricity™

Epicor Software Corporation

Epicor CRM

Five9, Inc.

Five9 Virtual Call Center Suite

InsideSales.com

Lead Response Management Suite by InsideSales.com

Intelenet Global Services Pvt. Ltd

E-Bill, an excel based application

Intelestream

intelecrm

InVision Software

InVision Enterprise WFM (News - Alert)

Jacada

Jacada WorkSpace

Jigsaw

Jigsaw Data Fusion

Knoa Software

Knoa Experience Performance Manager 5.5

LiveOps

LiveOps On-Demand Contact Center Platform

Mall Networks

Mall Networks Version 5

NCO Customer Management, Inc.

Customer Care and Inbound Sales Solution

NetSuite Inc.

NetSuite CRM+

nGenera CIM

nGen Proactive Chat

NICE Systems Ltd.

NICE SmartCenter



OAISYS

Tracer

Xactly Corporation

Xactly Incent

Z-Firm LLC

ShipRush

Parature, Inc.

*Parature (News - Alert)
Customer Service™*

Pegasystems

Customer Process Manager

Pitney Bowes

Business Insight

*Pitney Bowes Spectrum
Technology Platform*

Sage North America

ACT! by Sage

salesforce.com

Service Cloud 2

SAP BusinessObjects

*SAP BusinessObjects BI
OnDemand*

SAS

*SAS® CUSTOMER
INTELLIGENCE*

Soffront Software Inc;

Customer helpdesk

StarTek

*Business Process Outsourcing
of Customer Management*

Stream Global Services

Stream Global Services

SugarCRM Inc.

Sugar Professional

Syntellect

*Syntellect PhoneLink for
Salesforce.com*

**Thomas L. Cardella
& Associates**

*Thomas L. Cardella
& Associates*

Tigerpaw Software, Inc.

Tigerpaw CRM+ v11

UTOPY

UTOPY SpeechMiner

Verint Witness

Actionable Solutions

Impact 360®

Customer Feedback

OPTIMIZE YOUR CONTACT CENTER OPERATION



See Engage Contact
Center Suite at:
Global Connect
April 18-21, 2010
Denver, CO
Booth #907

Easy, affordable, total recording & workforce optimization for any size organization

From full-featured call recording and screen capture to coaching, workforce management, and advanced speech analytics, TelStrat's Engage Contact Center Suite answers each major aspect of your contact center operation. From a few seats to thousands. Easily. Affordably.

Engage Suite lets you:

- Capture complete customer interaction at every contact point
- Streamline call times, ensure consistency, and increase quality
- Elevate agent performance and training, and improve productivity
- Knowledge mine call content, maximize resources, and enhance the bottom line

Engage Suite Components

Call Recording | Screen Capture | Agent Evaluation & Reporting
E-Learning & Performance Tracking
Workforce Management | Speech Analytics



www.telstrat.com | sales@telstrat.com | 972-543-3500



Scaling Tower Life's Needs With UC

Unified communications enables organizations via contact centers to deliver improved customer-retaining/word-of-mouth attracting service while lowering costs by unifying the channels to deliver a consistent, effective level of service.

Tower Life Insurance, which is based in San Antonio, Texas, is one such firm that has benefitted from UC in the contact center. It is a leading life, health and accident insurance company specializing in providing large, multiple-site employees with third party health and employee welfare administration and managed care services, with over \$70 million in assets.

Tower Life has approximately 300 employees, including executives, business users, administrative personnel, receptionists, remote workers and 40 contact center agents and supervisors at its headquarters. The agents provide a variety of customer care services to clients in English and Spanish.

By late 2006 Tower Life found that it needed a better set of tools to communicate with its external and internal customers – it had legacy PBX, IVR, voicemail and faxing capabilities – and to deliver meaningful real-time and historical reporting metrics. It also wanted to automate more of its business processes via solutions and methods such as CTI/screen-pop, conditional routing schemes, improved IVR and intuitive self-help.

Tower Life's contact center's team members could not adequately manage call queues and route specific types of customers to the most appropriate skilled agent, nor could they adequately report on the metrics to effectively manage the business. Also the center could not provide screen-pops or an intuitive self-service offering to customers and or service in Spanish. Integration with back-office platforms that have process automation abilities was nonexistent.

Tower Life realized that providing the center with advanced contact handling

capabilities, with UC including presence coupled with multilingual IVR and backed by stronger reporting mechanisms would enable it to service customers faster and more effectively. It contacted Polly Gurley and Becky Cameron then from Cross Telecom, their respective Avaya business partner in 2007 to evaluate potential solutions.

Gurley and Cameron identified Tower Life's business issues, workflow challenges, user preferences and integration requirements. They compared and analyzed multiple platforms along with Zeacom's (www.zeacom.com) platform that would address the insurer's needs.

Tower Life decided on the Zeacom Communications Center (ZCC) UC and contact center (CC) application, integrated to a new Avaya Communication Manager S8500 and to its back-office platforms; the ZCC is Avaya-compatible. The ZCC solution would provide skills-based and conditional-back-office-data-based routing, multimedia (voice, e-mail, fax, Web callback) queuing, IVR in English and Spanish, agent/supervisor-accessible performance and statistical reporting and an intuitive desktop user interface.

Tower Life, Zeacom and the Avaya business partner formed an implementation team that mapped out how the new system would operate, establish the workflow design, coordinate the installation and manage migration with virtually no downtime for the insurer's customers. The process required extensive and seamless coordination as it involved integrating the Zeacom and Avaya solutions and shifting multiple

systems simultaneously to the new UC and CC platform and the Avaya switch. Making matters more challenging is that Tower Life uses several local and long distance carriers whose networks needed to link into the Avaya unit.

Tower Life went live with the new Zeacom and Avaya solution in late 2007. Since then service has improved substantially. The firm processes over 34 percent more interactions with only four additional agents; home-based agents can now be supported. The IVR system now processes 27 percent of calls from 11 percent in 2007. Agents manage queues across multiple channels from their desktops. If they have customers with issues that one of their colleagues are better able to handle they can see if they are on the line, on break or available with ZCC's presence capabilities.

New agent training time has also been reduced by more than 25 percent.

Tower Life now has new call wrap-up codes that provide a higher level of customer service by helping it better understand the reasons for each call. This enables the insurer to make future changes to better assist their callers. The Zeacom solution also permits executives to quantitatively analyze the costs associated with supporting each of their large employer group clients.

"The new Zeacom system has positively affected our entire organization: well beyond our customer service department," says Tower Life Vice President Ben Zachry. "Zecom spent an incredible amount of time on the front end of the project working closely with Polly and Becky, understanding our business and its related needs and addressing our needs with their technology. The follow-up and technical support we received from Zeacom has been superb. Zeacom has helped us transform our call center into a true contact center." **CIS**

IntelliResponse Cover 4
www.intelliresponse.com

Call Center Software Community 21
http://call-center-software.tmcnet.com

Contact Center Solutions Community 3
http://callcenterinfo.tmcnet.com

Global Headset Community 11
http://headsets.tmcnet.com

InContact..... Cover 3
www.incontact.com

Infocision Cover 2
www.infocision.com

ITEXPO West..... 27
www.tmcnet.com/voip/conference/west-10

Outbound Call Center Community 5
http://outbound-call-center.tmcnet.com

Promero 15
www.promero.com

R.L. Bencin & Associates 31
www.rlbencin.com

Sun Knowledge 22
www.sunknowledge.com

TelStrat..... 29
www.telstrat.com

Thomas L. Cardella Associates 31
www.tlcassociates.com

Verint Systems..... 23
www.verint.com

Contact Center Specialists

*Inbound | Outbound | E-mail
Web Chat | Off Shore | At-home Agent*

Thomas L. Cardella
A S S O C I A T E S

1-888-788-0333 | www.tlcassociates.com

Professional Telesales/Customer Service Management Searches

- Search consultants to most of the top ten service agencies in the U.S. and over 50 of the Fortune 500 companies. Small companies, too.
- All custom searches using a 25,000 resume file plus extensive proactive calling.
- Dedicated telesales/customer service searches since 1981...the right and the best!

R.L. Bencin & Associates

2616 Hidden Canyon Dr.
Brecksville, OH 44141
440-526-6726

Resumes welcomed!
E-mail: rlbencin@netzero.net
Web site: www.rlbencin.com

IDENTIFICATION STATEMENT

CUSTOMER INTER@CTION SOLUTIONS® magazine (ISSN: 1533-3078) is published monthly by Technology Marketing Corporation, River Park, 800 Connecticut Ave 1st Fl., Norwalk, CT 06854-1628 U.S.A. Periodicals postage paid at Norwalk, Connecticut and additional mailing offices. Postmaster: Send address changes to: **CUSTOMER INTER@CTION SOLUTIONS®**, Technology Marketing Corporation, River Park, 800 Connecticut Ave 1st Fl., Norwalk, CT 06854-1628 U.S.A.

To subscribe, call toll-free: 800-243-6002. If busy, call 203-852-6800 or write to the circulation director at srusso@tmcnet.com. Subscription rates (published monthly): Free for qualified subscribers in the U.S.A. only. For non-qualified U.S.A. subscribers, \$59. All Canadian subscribers, \$89. All Foreign (air mail), \$109. All orders are payable in advance in U.S. dollars drawn against a U.S. bank. Connecticut residents add applicable sales tax.



The Benefits and Pratfalls of Social Media/Channel

Social media – a.k.a. the social channel – is fast becoming a vital means by which customers are engaging with companies. It offers for businesses a key benefit in that it enables them to listen, track and follow up on what buyers/prospects/users are saying about their firms. It is the electronic equivalent of a town hall meeting: airing and discussing comments, issues, complaints, recommendations and suggestions.

Time Warner Cable (TWC) has become one of the latest and one of the largest firms to use social media and for good reason: It is competing fiercely with landline and wireless telco firms and satellite providers in some of the U.S.'s hottest markets: New York City/New York State, southern California, Texas and the Carolinas.

TWC has created a specialized Online Customer Care Team that uses Twitter, other forms of social media plus e-mail to get customers help anytime, anywhere, and on any device. It has also launched a new blog titled Untangled. Managed and edited by TWC's Public Affairs group it discusses both large and small initiatives such as policy issues, service alerts, product rollouts.

Yet there are pratfalls with the social media/channel the deepest of which is that whatever company employees or representatives say, to cite the Miranda warning "may be used against you..." in both the courts of law and public opinion.

That is because social media is just that, media. It is no different than radio, TV and print like this magazine. Media is mass and public-facing. That feature coupled with the deliberate anonymity of most commentators on social sites makes it unique as a channel; it is not one-to-one like calls, e-mails and chat sessions.

Using media requires exceptional communications skills including listening and reading and what to listen and read for, asking key questions and responding quickly and effectively with statements that accurately reflect the organizations' branding, policies and positions. Corporate communications and public relations professionals have these skills along with journalists and lawyers.

In contrast, most contact center agents tend not to have the comparable training or skills. Their writing abilities may not be up to public communications standards.

There is a certain leeway granted by customers, employers and the courts when it comes to what is said in individual interactions. There is none in the media. You survive or hang by your

words. Reputations can be made or blown with the slip of a tongue or finger. The one saving grace with social media is, like e-mail and SMS, text-based, which means there is a short window, i.e. buffering to get the right answers, but those replies must be publicly defensible.

Is there a role for contact centers in social media? Yes, but under strictly controlled circumstances. Here are two scenarios worth investigating:

- General contact center agents can triage social channel comments i.e. move them from the public to the private spheres based on well-scripted protocols. If commentators have specific complaints or have suggestions, agents can intervene and ask them to contact the companies directly or explain how to reach out to them to address these issues. This leaves the heavy duty brand management/responses to the PR experts. It also puts people in the "put-up or shut-up I'd be happy to discuss this privately" position.
- Small, specialized (and presumably well-paid) and highly-trained teams like TWC's to handle social interactions. It is worth noting though that TWC has only four people assigned to online social and e-mail while serving over 14 million customers in hip, tech-savvy and social media-immersed markets such as New York City and Los Angeles.

At the very least contact center agents should have ready access to what customers are saying about their companies on social media sites in case they get calls or e-mails about these issues. And be provided with heavily scripted responses to ensure consistent corporate messages.

TMC is offering a unique opportunity to learn about implementing the social channel in concert with the others at a new event, the Social Customer Summit that is taking place at **ITEXPO** West Oct. 4 to Oct. 6, 2010 at the Los Angeles Convention Center. The Summit will be a great opportunity to find out more about and to discuss issues such as managing the media and what skills, training and tools are needed and have proven to enable successful use of this channel. **CIS**

YOU DON'T HAVE TO WEAR A CAPE TO BE A SUPERHERO



inContact's superior call center solutions can automate your processes, enable you to provide better service to your customers, save you money, and not only make your job easier, but make you look like a call center superhero.

ACD

CTI

IVR

Feedback

Workforce Management

eLearning

Hiring

CRM Integrations



Want to revolutionize your professional image and your results?
Visit <http://www.incontact.com/customer-heroes> today!

Helping Customers Get Answers

Multi-Channel Self-Service



web answers



agent answers



social answers



mobile answers

As more and more consumers and professionals use mobile devices and social media platforms, Web Self Service tools that address customers' concerns promptly and effectively have grown increasingly valuable.

The Web Self Service Community is your one-stop source for customer-facing organizations with clients across a variety of channels, including:

- Corporate Web sites
- Mobile devices
- Social media platforms
- Agent desktops

Visit the global online community for:

- Breaking news
- Industry trends
- Expert opinions
- Feature articles
- Case studies
- White papers

intelliresponse™

<http://web-self-service.tmcnet.com>

