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Taking the Customer Experience Mobile

5 Ways to **Increase Lead Generation** Value

Conquering Channel Chaos

Five9 Gives Muscle to **Outbound Calling**

PERSPECTIVE

Rich Tehrani,
CEO, TMC

Giving Customers Control & New Ways to Leverage Big Data

In yet another sign that customers are increasingly taking the reins of their communications experiences, several companies in the recent months have unveiled new self-help solutions.

For example, AMDOCS earlier this year unveiled a suite of solutions dubbed CES 9, which the company internally calls the "Wow release." The company says it has seamlessly connected its customer management, billing, OSS, CRM and network controller solutions allowing customers for the first time to see their experience from the device down to the network.

One of the biggest advances in this new solution will allow carriers to let their customers take advantage of self-service on the devices they use. For example, a tablet user will be able to upgrade his or her data account without having to call a customer service representative. The company believes the release will actually allow 80 percent of common transactions to be completed without a call center call-in.

Rebecca Prudhomme of AMDOCS explains that the industry is adopting a new metric regarding customer satisfaction that gauges a customer's willingness to recommend a service to friends or family. This Net Promoter Score gave the company the opportunity to evaluate a new KPI, which helped it roll out new products. One is the Multichannel self-service solution, described above. In addition to allowing customers to make changes on their accounts it also allows seamless transfer of transactions across devices from start to finish.

In addition, the company's new Proactive Care solution uses big data methodology to determine the most common reasons customers call and subsequently arms carriers with information they need to be proactive on future calls. The company's Order-to-Activation service, meanwhile, is designed to help carriers deal with the fact that by 2016 more than 24 billion connected devices are expected to be in service. Finally, the company touts its cloud solutions, which span a wide range of applications – from enabling MVNO solutions, M2M and connected home, to allowing carriers to provide and effectively monetize cloud-based solutions as they provide MSP products to SMBs. Moreover they also provide private cloud solutions or virtual private clouds for their customers.

Meanwhile, Comverse offers its Share solution, which allows carriers to deliver a Facebook app that gives users a portal into their subscriber accounts. Once they enter the app, they are prompted to enter a phone number and are subsequently sent a text message allowing them to get a code that enables authentication.

At this point subscribers can check their account balance, send notes to customer care, and more. The operator benefits as well because they can mine the users' likes and preferences, allowing them to determine, for example, if a particular candidate may be a candidate for a bundle or special offering.

By integrating the traditional knowledge carriers have about a customer (for example, what device the person uses), they can offer that person targeted ads. In this scenario, an Android user with a Samsung device near contract-end may be interested and likely to click on an ad for an HTC One.

On a slightly different note, but still tying in to the theme of leveraging data to deliver a better customer experience, NICE is talking about its Voice of the Customer solution, which enables an innovative way of using text messaging to allow free-form survey responses via text post interaction. That can be live, via phone, or during a visit to a website. This is free-form text messaging, allowing customers to respond however they want, and the analytics kicks in to respond accordingly.

The individual could say, for example, "I really think the agent I just spoke with is atrocious." The information supplied by the customer would then be used to alter training of the particular agent if needed. It could further be used to modify products or product training. The idea is acting in real-time to business challenges. In one example a survey after a flight allowed the crew manager to get the results immediately and then call a meeting to adjust things before the next flight took off.

The product also is able to determine which interactions can be used as an upsell opportunity. Speaking of which, the company's Service-to-Sales solution in conjunction with IBM uses analytics to determine if an upsell opportunity exists on a service call. At this point, the agent is guided through the process of selling the customer in a seamless manner, which shortens the sales cycle.

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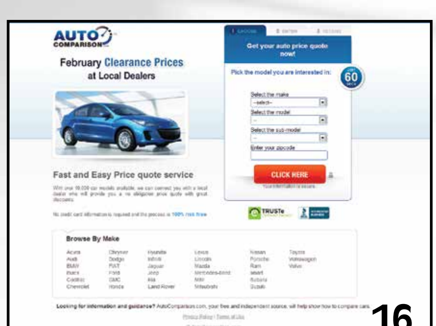

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ANGLE

Paula Bernier,
Executive Editor

Getting Personal

It's always been true. And at no time has it been more true than today. People like to be treated as individuals. So, as you probably already are aware, organizations are learning how to contend with the big (data) so they can better reach the small (individual). However, as you probably also are aware, it's very early days for this kind of personalized marketing, although a select few companies (namely Amazon) have been doing it for a few years and I've been hearing about data mining for nearly two decades.

When I think about personalization, my mind always goes first to the retail goods space. I think about how, for example, one of my favorite apparel companies (Talbots) reaches out to me with offers via e-mail, and how it keeps a database with customer sizes and recent purchases so stores can offer guidance to family members (my mother-in-law, in this case) when they are doing Christmas shopping. And I think about how Talbots and others could go even further with this, potentially sending me alerts on my mobile phone about a sale when they see I'm next door with my daughter at Barnes & Noble or across the street dining at Zinc Bistro.

Interestingly, however, research outfit Ovum in a recent report chose to focus on personalization as it relates to the insurance vertical.

The talking duck, spunky Flo, and that dude from 30 Rock are all pretty entertaining, but apparently – in this day and age of personalization – they are not enough.

Ovum says that the insurance sector "is quickly moving through an inflection point in the way commerce is conducted" – moving from a model of one-to-many messaging worked to one in which customers are playing a more active role and, thus, blanket marketing is no longer the best method of outreach. As a result, Ovum says, insurers now have a greater need to understand customers and their needs, and to target messaging appropriately based on that.

"Without a thorough knowledge of their customers, insurers are heading towards a competitive myopia. Customer experiences are becoming the basis of competition in the insurance industry and companies need to encompass customer needs, expectations, and satisfaction into their customer experience management strategy," says Barry Rabkin, principal analyst for Ovum's insurance technology practice.

That said, companies continue to provide big data collection and analytics tools for the insurance and other industries to better meet evolving customer expectations.

Among the new developments on this front is a solution called Alteryx Strategic Analytics 8.5.

"With Alteryx Strategic Analytics 8.5, we are putting big data and customer analytics where they have the most value – into the hands of the business analyst and the decision maker," says George Mathew, president and chief operating officer at Alteryx. "We are providing a purpose-built product that enables data artisans to easily create the big data customer analytics that their sales, marketing and operations business decision makers need."

Release 8.5 includes new preview capabilities for Twitter, Yelp and Foursquare that can be added into any analytic workflow. And Alteryx now has a partnership with social media data company Gnip, whose solution is now integrated with the Alteryx solution.

"Kaiser Permanente has been using the Alteryx platform to blend all of the relevant data needed to get to those strategic decisions quicker and to implement our analytics projects faster," says Greg Hall, senior service optimization leader at Kaiser Permanente. "Alteryx Strategic Analytics 8.5 takes this integration to the next level to leverage an even broader array of data sources and offers a compelling new analytic design environment – both essential to us as we continue to expand our use of strategic analytics."

On a separate front, a company called j2 Global, Inc. has introduced Campaigner Elements to its Campaigner line. This is an improved API for Campaigner Email Marketing – allowing marketers to integrate systems and analyze big data to gain visibility into subscriber behavior.

"Integration and marketing automation is one of the biggest challenges for marketers looking to target the right customers in the most efficient way," says Rick Faulk, general manager of cloud services for sales and marketing at Campaigner. "Campaigner Elements API allows users the flexibility to share their data between applications and take advantage of big data analysis, to run more effective campaigns and increase their retention and revenue."

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.

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by Paula Bernier

Taking the Customer Experience Mobile

People are increasingly on the move. And they want to be able to conduct business and manage their personal lives from wherever they are and whenever they have a free moment to do so. As a result, businesses are catering to the new mobile lifestyle. At the same time, businesses are enabling their own employees to leverage the flexibility and real-time responsiveness that mobile can help deliver.

"Customer Experience Management, or CEM, is a buzzword these days in mobile," notes ABI Research. "While CEM has been applied across verticals such as financial services, transportation, food and beverage, it's only recently that CEM has been applied in mobile."

ABI defines CEM as relating to customer care, subscriber data management, billing and charging, policy, device management, service assurance, network analytics, and network operations. And it values the CEM market at $1.3 billion this year.

"The Mobile CEM landscape today is dominated by IT vendors such as HP, Amdocs, and IBM which are leveraging strengths in IT combined with a heavy focus on customer analytics and data mining," says Aditya Kaul, practice director. "However, for CEM to succeed, the network piece including network monitoring, optimization, DPI and policy, has to go hand-in-hand with the IT piece, which is where traditional network vendors come in."

Among the carriers bringing a mobile component into their customer care operations is Telefónica Spain, which is using a tool called NICE Mobile Research at its Movistar business. The solution will serve as a bridge between Movistar's self-service mobile app and the contact center. That's because all information about the customer's activities in the mobile application are automatically transferred to the contact center and immediately displayed on the agent desktop. And that will enable Movistar agents to help customers in what the companies say is a highly personalized manner.

"We believe that our outstanding customer service is a key differentiator in our market, and one way to strengthen our position is to make sure that our mobile application delivers a complete customer experience and resolution," says Mario Soro, director of CRM technology at Movistar. "NICE Mobile Reach offers a unique, real-time connection between the self-service channel and the contact center, and will enable us to provide personalized and effective service to our mobile customers."

On a separate front, and as discussed in this issue's Perspective column, AMDOCS earlier this year unveiled a suite of solutions dubbed CES 9 that seamlessly connect its customer management, billing, OSS, CRM and network controller. As a result, mobile customers for the first time can see their experience from the device down to the network.

One of the biggest advances in this new solution will allow carriers to let

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– ABI Research

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their customers take advantage of self-service on the devices they use. For example, a tablet user will be able to upgrade his or her data account without having to call a customer service representative. The company believes the release will actually allow 80 percent of common transactions to be completed without a call center call-in.

Carrier iQ offers iQ Care, a mobile client-based solution that can enable wireless service providers to lower their customer care costs, do more effective network planning and optimization, and improve the customer experience. The product, which is also being used by some enterprise customers and embedded by select mobile handset manufacturers, became generally available earlier this year.

Ben Bergeret, vice president and general manager of devices, explains that 7-year-old Carrier iQ was created after its founders became frustrated with the lousy cellular coverage where they lived and their carrier's apparent inability to do anything about it. So they founded Carrier iQ, which delivers software that sits on your mobile phone to collect information on the performance of the phone and the network to which it is connected, and deliver those details to a Hadoop-based big data system. These parameters can include phone battery and memory usage, application memory and performance, phone and application connectivity times, and much more.

One large tier 1 carrier that uses the solution says its business has been transformed as a result, says Bergeret.

"We give them an outside-in view," he adds.

When a subscriber calls customer care, Carrier iQ delivers to the help desk agent details on the status of the caller's phone – including information on when and how the device/service fell outside expected norms (for example, 40 dropped calls, 10 abnormal shutdowns, etc.), a daily activity summary, overall performance of various traffic types, and more. That way, rather than just suggesting that callers reboot their devices, these reps are armed with the information to provide more user-specific solutions, Bergeret says.

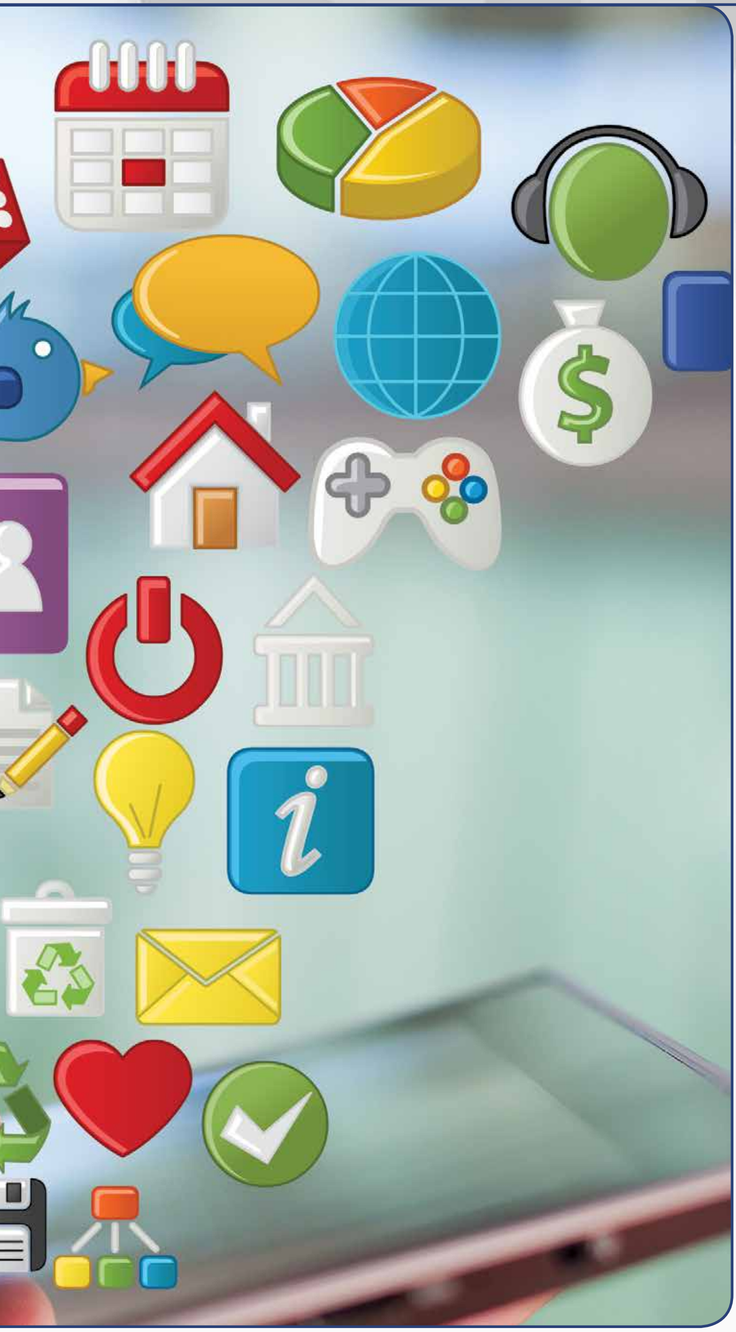
That's clearly good for subscribers, and it's great for mobile operators, which as a result see reduced customer care call handling times of 20 percent, he explains.

The Carrier iQ solution also can result in fewer needless mobile device returns, which bear enormous costs – almost $8 billion in 2013, Bergeret says. He adds that if you can eliminate just 40 percent of no-fault-found returns you can realize major savings.

Of course, the opportunity to leverage mobile to target customers, and deliver more efficient and personalized customer service and content, can be applied to a wide array of industry types.

OpenMarket's Mobile Engagement Platform enables enterprises of all stripes to deliver mobile messages in an effort to optimize customer communications, improve client experience, drive brand awareness, and/or generate new revenue. The SaaS-based solution can leverage SMS, MMS, push notifications, e-mail, voice, and IVR.

Enterprises are using this for corporate communications including company announcements, emergency alerts, payroll reminders and employee feedback; customer service, including balance alerts and bill reminders; operations and logistics, such as order alerts and shipping notifications; point-of-sale applications, including receipt delivery and mobile ticket; sales and marketing, including special offers, polling and promotions; security, including password resets and user authen-



tication; and work force management, including for logging hours and shift change notices.

A company called Revelation, which provides online and mobile qualitative research tools, recently launched Revelation|Next, a qualitative consumer research platform that leverages mobile devices and the web to capture in-the-moment consumer behaviors and insights.

"Consumers live via mobile and the web and qualitative research needs to go where they are, and provide a social experience. Revelation|Next is the first mobile + web qualitative platform that captures the feel of social apps," says Steve August, CEO, Revelation, whose Revelation|Next platform can be white labeled.

Another company, DoubleDutch, offers a mobile conference application for the events industry. Companies like Cisco, Roche, Wells Fargo, Lowe's, and Bristol-Myers Squibb use DoubleDutch at meetings and conferences worldwide.

The goal of this solution is to create maximum social engagement within the event app to deliver deeper insight for event organizers and sponsors.

Apps based on DoubleDutch allow event attendees to review sessions, bookmark favorite exhibitors, and meet other attendees. And it allows event organizers to promote and offer related sponsorships around specific content and events.

"We just used the DoubleDutch Events app at our recent National Kick Off, and the insight and engagement we gained was incredible," says Jed Ayres, senior vice president of partner management and marketing at MCPc. "Our entire organization loved the app's social features and super speed. Attendees were more connected and informed than ever before, and the best part is, it's all measurable! This type of app would be beneficial for any event organizer or attendee, because it quite simply delivers feedback, speed, and value unlike anything we've used before."

ClearSlide, a provider of a web-based sales engagement platform, recently announced a mobile set of products designed to deliver pitches, presentations, and proposals to engage customers more effectively and shorten sales cycles.

ClearSlide Outside has a mobile-optimized interface that allows sales teams to access their key pieces of collateral, presentations, and proposal documents from anywhere. ClearSlide Remote is an iPhone app that enables sales people to select and drive their presentations from their iPhones.

"To build a successful sales organization, field sales reps need to have access to the collateral and information needed to have personalized conversations with prospects and customers," says Al Lieb, CEO of ClearSlide. "Today thousands of customers depend on ClearSlide as their sales engagement solution to engage customers and close business faster. With our innovative mobile platform initiative, ClearSlide is transforming the way field sales organizations sell on the road by giving them quick and easy access to their collateral, but also providing them with in-depth analytics and insight into how their collateral is being used."

ApartmentGuide.com is among the users of this solution.

"We sync our presentations to our iPads and take them out in the field," says Leslie Serpas, market sales manager for ApartmentGuide.com. "In a small market, it is very important to be able to meet with our clients in person. ClearSlide Outside is easy and works very well by allowing us to customize presentations for each specific client we are meeting with."

Angel Lands with Genesys

Genesys has agreed to acquire self-service platform provider Angel for $110 million. Angel has a cloud-based solution that can provide self-service related to chat, IVR, mobile and SMS. It can be leveraged to enable companies to collect survey responses, notify customers of order status and refills, and track support tickets.

WFO Outfit Celebrates 20 Years

TelStrat, a global supplier of comprehensive contact center solutions and business call recording products, is celebrating its twentieth anniversary. Bob Carroll established TelStrat, which began as a supplier of advanced OEM solutions for Cisco, Nortel, and other big telecommunications equipment companies. TelStrat today is a provider of advanced call recording and workforce optimization solutions. In a press release, the company says it "has refined call recording, screen capture, quality management, speech and desktop analytics, and workforce management into the most affordable, feature-laden contact center WFO suite on the market."

Intraday Brings Back Office to Frontline Agents

Intradiem now offers a solution that enables contact center agents to complete back office tasks during their idle time. The intraday management technology addresses claims, customer research, invoice processing and data entry, and can dynamically respond to changes in call volume and aggregate small increments of idle time across the entire agent population to create productive sessions for individual agents. "Moving back office work into the contact center allows us to become a more productive operation," says John Porter, CEO of Focus Services, an Intradiem client. "Like any call center, fluctuating call volume is constant and results in an abundance of agent available time. Having the ability to utilize agent available time to process back office work improves both margins and customer satisfaction."

OnGuard Ensures Quality Experience for Cisco Customers

Spanlink Communications has introduced a support and managed services offering called OnGuard, which addresses maintenance, proactive monitoring and managed services for Cisco collaboration and contact center solutions and third-party applications. OnGuard was designed to help contact centers maximize uptime, increase productivity and minimize risk by proactively monitoring systems to catch errors before they happen. Spanlink pairs this monitoring with dedicated support – should something go wrong, OnGuard automatically communicates issues and progress to key parties so everyone's in the loop, and a Spanlink engineer will stay on the line until the issue is resolved. "We've spent the last 10 years building a legacy of customer-first support services for Cisco contact centers of all types," says Mark Langanki, Spanlink's executive vice president of engineering and operations. "OnGuard is a culmination of our technical expertise and acute understanding of the customer experience. We are fully invested in the success of our customers' Cisco solutions, and OnGuard helps us protect this investment."

Pegasystems Enhances CPM Solution

BPM and CRM company Pegasystems Inc. recently released a new version of its Customer Process Manager solution, which enables real-time collaboration among customers, customer service representatives, and back-office teams across the enterprise. This release features enhanced social capabilities that allow real-time collaboration and improved productivity across customer support functions. New social collaboration functionality includes secure chat, team discussions, surveys, news and alerts. A new Next-Best-Action Marketing feature delivers predictive and adaptive analytics, which anticipate customer needs so businesses can generate relevant offers at appropriate times. "Customers today are looking for informed, transparent and intelligent customer service. They want to engage not only with the company they do business with, but also with one another," says Alan Trefler, Founder and CEO of Pegasystems. "That's why customers are naturally attracted to a customer engagement hub like Pega's CPM that respects their preferences for channel, and can predict the best possible resolution to their requests. Our clients have recognized that customer service is intimately linked to marketing and sales. They have learned to think about the entire customer journey, and how to foster a lifelong relationship with their customers. They are using Pega to take a more holistic, customer-centric approach, meeting their most critical business challenges head on."

Nuance Expands Nina

Nuance Communications Inc. has expanded Nina, its customer service virtual assistant. It's now available via the web, has text-based virtual assistant capabilities for web marketing, helps enable ecommerce and support applications, and can recognize and speak 38 languages. "USAA is a pioneer in delivering great customer experiences," says Neff Hudson, assistant vice president for emerging channels at USAA. "We have built our legacy of service by ensuring that our members get the right answer with minimal effort and with ease. We were early adopters of Nina in our mobile app, and we are pleased to see that Nuance is extending that same compelling customer experience to the web."

by Dan Burkland

Power Dialer

Five9 Gives Muscle to DirectBuy San Diego's Outbound Calling

DirectBuy was founded in 1971 to offer consumers a different, less expensive way to buy home products and services. Based in Merrillville, Ind., the company has 160 showrooms across the U.S. and Canada. Members pay a fee to join, which allows them to buy merchandise directly from 700 manufacturers and suppliers while avoiding the price markups typically charged by retailers. Products include home furnishings, home improvement items, outdoor furnishings, flooring, and other accessories.

Until October 2012, DirectBuy San Diego was owned and operated by the Denischuk family. Melanie Denischuk, who oversaw DirectBuy San Diego's call center, is currently the marketing manager for DirectBuy San Antonio, where she holds similar responsibilities.

A Need for Speed

DirectBuy's revenue comes from selling memberships to consumers. A key matrix for each franchise is its cost per member – the average amount of money spent to get someone to join DirectBuy. Each franchise does its own marketing and advertising, and key to these efforts are outbound call centers. Offers, such as free home improvement makeovers, are used to set up appointments with prospective members.

By June 2012, according to Melanie Denischuk, DirectBuy San Diego was spending an average of more than $1,100 for each new member.

"We had a ton of members, but we also needed a lot of staff to generate those members," Denischuk recalled. "At the time, I had an eight-person staff, and we were averaging eight to 10 members a month, so our cost per member was really high."

Denischuk knew her franchise could do better, but it was hindered by a contact management system that only allowed one-to-one calls and had no efficient means of weeding out consumers on do not call lists. It also had trouble retaining staff.

"Our agents – especially the higher quality employees – were getting frustrated with the calling results because they'd get bored," she said. "Eventually we would have had to go to a different lead source or possibly outsource our call center to try and make up the difference."

Make It Work

Denischuk initially considered two other providers of call center hardware systems. Both were expensive, however, and regardless of which one it chose, DirectBuy San Diego would have had to set up the system itself.

"We wouldn't have had the first clue what to do," Denischuk said. "I'm not a techie person. I'm not going to sit for hours trying to figure out how to get something to work."

Now focused on cost and ease of use, Denischuk began to explore cloud solutions.

Five9 was the first company that reached out to her. Right away, she liked what she heard about the company's Power Dialer solution, which automates outbound calling campaigns, automatically detects answering machines and busy signals, and prevents do not call numbers from being dialed.

"My account manager, Mike Dunbar, was great and answered all my questions," she said.

Denischuk particularly liked the month-to-month contract ("absolutely awesome," she said) because if the system was not a good fit, she could quickly opt out – and if it worked, she could easily add more seats.

Five9 would install the system, too.

"That was huge," she says. "All our staff had to do was log in to a website. And Five9 conducted a data dive in which they made sure the system was ready to use before we ever signed anything. That was really comforting."

Triple the Numbers

If first impressions were good, the results were even better. Before implementing Five9's Power Dialer at the beginning of June 2012, DirectBuy San Diego's agents were speaking with

30 to 50 potential members a day. Suddenly they were talking to between 110 and 150 people, Denischuk said.

More importantly, the company's agents were getting a lot more appointments, which began to drive down cost-per-member numbers from more than $1,100 to just $700. And DirectBuy San Diego's call agents – who receive bonuses for appointments set – were much happier, too.

"With Five9, we could have three lines dialing at once," Denischuk explained. "When we had three people with nine lines dialing, it was advantageous for everyone because our staff was generating more income as well."

A Few Nice Surprises

There have been other benefits, Denischuk said. Five9's staff spoke with the creator of DirectBuy's contact management system, called Hinkle, and now both systems are integrated. All the information agents capture from their calls goes directly into Hinkle, and all leads are automatically entered into Five9.

"That was a bonus," Denischuk said. "I didn't know Five9 would be willing to work with us to get that going, but they did."

Five9 also allowed DirectBuy San Diego to lower its leads-per-member ratio. Before, it took 40 leads to get one member; now it takes an average of 30. Denischuk's staff became more focused.

"When you're on the phone eight hours a day, it can really get to you, especially when you're cold calling. Our agents are constantly getting calls now – there are no three-, five-, or eight-minute waits between calls, and they don't have to listen to endless ringing. They hear the beep and they know they have to be ready to go."

Five9's reporting and management capabilities were also a nice surprise.

"With Five9, you can get a report on pretty much anything you need to manage your staff," Denischuk said. "If I'm out of the building, I can log in from home and see what my staff is doing at pretty much any time of the day."

Spreading Like Wildfire

Almost immediately, DirectBuy San Diego's outbound call success triggered a wave of interest throughout other DirectBuy clubs.

"Since using Five9, our results and conversion rates instantly tripled. By three weeks in, it was having such a consistent, meaningful impact that I was asked to speak at our first owner's meeting about what Five9 had done for us."

Since then, Denischuk estimates nearly 30 DirectBuy franchises have started using Five9.

"It has spread like wildfire," she said. "We have clubs that use nothing but Five9 now. Across our network, the contact ratio alone has doubled if not tripled in some areas of the country just by putting Five9 in front of our calling staff."

Dan Burkland is senior vice president of enterprise sales and business development at Five9 (www.five9.com).

by Frans van Hulle

5 Ways to Increase Lead Generation Value

For the past couple of years, a steady decrease in lead quality has been observed in the online lead generation space. According to MarketingSherpa, obtaining high quality leads was the major challenge marketers were facing in 2012, and there is little doubt that this is also on top of their agenda in 2013.

Increasingly complex interconnections, an ever-growing number of players and non transparent activities have resulted in a situation where fraud and lead recycling are common practice. As lead quality decreases, lead pricing declines, resulting in an overall deterioration of the value of the lead gen space. Nevertheless, many marketers have their minds set on finding strategic and persistent methods and strategies to increase lead generation values and to re-introduce practices that benefit the lead gen industry. To achieve this, many small improvements can have tremendous positive impacts on lead gen quality.

Invest in a Good Lead Gen Form

The power of a good lead gen form is often overlooked and underestimated by many marketers. Lead gen forms need to be well optimized to retain as much user interest as possible. Forms that are too complicated or too much work are not user-friendly and less likely to achieve user willingness and commitment to complete forms correctly.

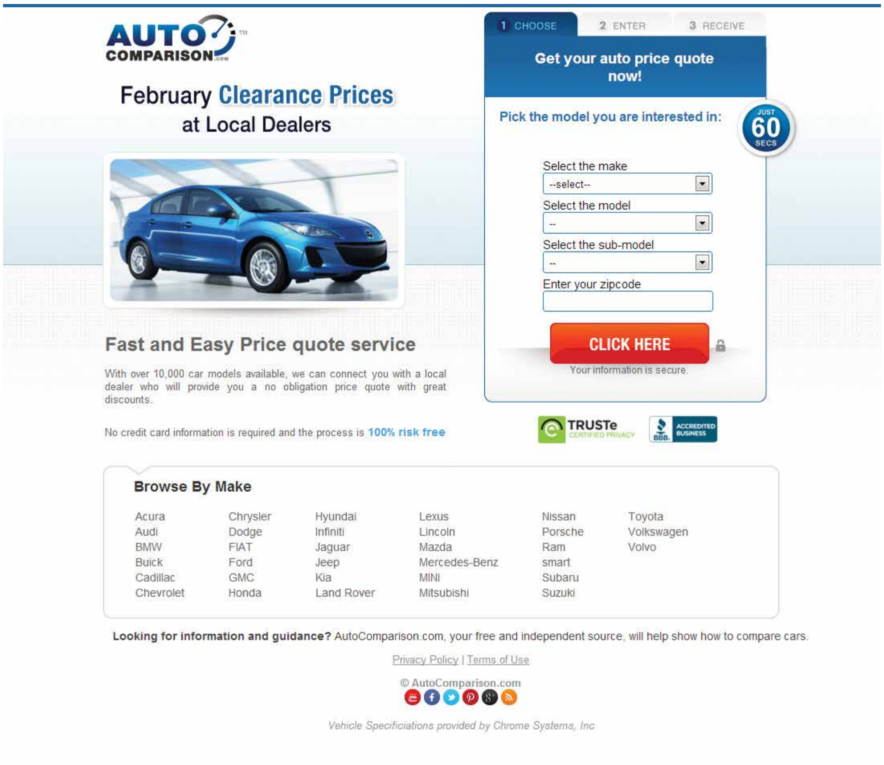
To make forms as user friendly as possible, they have to function on different browsers to guarantee all users have the same access to forms. Moreover, having a monkey-proof form that is simple and easy-to-use, with specific information on how to supply information, can go a long way.

Automatic correction tools that ensure phone numbers and ZIP codes are entered in the correct format will also greatly decrease bad data. When devising good lead gen forms, it is also essential to include good error messages that assist users and show exact error locations, as well as how to correct them. Again, if error messages are not user-friendly, they will be less inclined to complete and submit forms.

To sum up, the perception that a bad quality lead often starts with incorrect or incomplete user data, and perhaps lack of commitment, can be decreased by having a good optimized lead.

Think Mobile

Mobile traffic now makes up 20 percent of all U.S. web traffic, according to 2012 data from Chitika. This trend



is expected to continue, with Cisco estimating that mobile traffic will grow thirteen-fold by 2017.

That's why it's of crucial importance to focus on making the switch and guaranteeing that lead gen forms and websites are mobile-enabled. Some mobile leads at the moment are impulse driven, meaning that many mobile users stumble upon lead gen forms. By taking mobile users into account, marketers can tap into the vast mobile market and increase sales conversions.

Mobile lead gen tools that are gaining importance are mobile applications such as click-to-call, which enable mobile users to directly call agents to obtain information or quotes. What better way to guarantee lead quality and increase lead values than having committed users calling service providers directly?

Lead Verification

The simple rule is: You can't verify enough. Even if you only weed out a small percentage of bad traffic by verifying and scoring leads, this will have a massive impact on sales conversions.

Improving and optimizing lead generation forms will already go a long way, but verifying and scoring leads allows an insight into the quality of leads and to predict lead conversions.

There are many ways to verify leads internally, for example, with the help of Google Analytics, by analyzing how much time users spend on filling in forms, how many interactive clicks there are on lead gen websites, and whether or not IPs match zip codes. Moreover, external lead verification systems offered by multiple companies can cross-check lead data against larger databases to make sure correct phone numbers and addresses are supplied. As a result, passing on insight and predicting high quality can increase lead values tremendously.

Think Multi-Channel

It's easy to focus on one type of traffic channel, especially if it works, but there is great value in continuously expanding and diversifying strategies for lead generation.

Instead of focusing on one type of traffic source alone, it's important to think multi-channel and to integrate lead generation horizontally. Social media is becoming one of the most efficient and successful lead generation systems, allowing organizations to build good relationships with users and to build trust. E-mail marketing has lost a bit of its glory in the past couple of years, but should not be underestimated as an efficient channel to generate and nurture leads. Investing in premium domains and building trustworthy brands also helps in increasing lead values by providing users with good content and useful information.

In terms of web traffic, it's vital to have clear and well-working SEO/SEM strategies to ensure that lead gen forms are more easily accessible. By diversifying lead generation channels, marketers can influence, or even force, their peers to follow suit and to think outside the box. A vibrant and dynamic industry that continuously comes up with new and exciting opportunities for lead generation is less likely to get caught in a rut.

Lead Nurturing/Follow up

Even the best leads decrease in quality if there is no good follow up and lead nurturing.

Lead gen companies should work in close cooperation with sales departments to obtain feedback on the actual quality and conversion of leads. Let's face it, lead conversion is what actually matters, and the whole point of lead generation is the eventual sale. So once a lead is passed on, there should be a guarantee that leads are followed up and nurtured as fast as possible.

Many high-quality leads may simply fall through the cracks if sales departments don't react fast or not aggressive enough. The work of lead generation companies therefore should not end once the lead is sold to buyers, but there should be constant feedback and interaction between sales departments and lead gen companies to improve practices and increase lead values. M

Frans van Hulle is CEO of ReviMedia (www.revimedia.com).

by Jason Spievak

Beyond Call Tracking

Call Marketing Automation Delivers the ROI

U.S. businesses spend more than $300 billion on advertising each year, but only about 15 percent of that is spent on online advertising. The other quarter trillion dollars is spent each year not to drive a click but to drive a store visit or a phone call – tens of billions of phone calls each year from U.S. consumers to businesses. And that number is growing by billions of calls each year due to the growth of mobile search and the ubiquity of mobile phones, which results in consumers being connected wherever they are.

These developments have increased the importance of call marketing for advertisers. So, for businesses that talk to their customers on the phone, call tracking is now an essential capability. It allows marketers to properly attribute calls and marketing campaigns to a lead source, providing essential business intelligence.

Call tracking is a technology that is decades old, and it has long been a key component of campaigns involving call centers. Businesses want those calls because they convert into customers at a much higher rate than Internet clicks and also at a higher average order value. But they only want high-quality calls because it costs them several dollars each time they answer the phone. So, for businesses that are looking to fully capitalize on the value of call marketing campaigns, lead attribution is merely a starting point. Call marketing automation is the key to truly unlocking the value of a call marketing campaign.

There is some confusion about what constitutes call marketing automation in the industry, with some initially believing that call tracking and call marketing automation are one and the same. However, call marketing automation is a much more comprehensive approach, of which call tracking is just a single component. The right call marketing automation solution delivers complete campaign management, clear attribution and practical analytics in one end-to-end solution and makes it easy to seamlessly integrate with the solutions marketers already use.

With call marketing automation, many more elements are involved, including quality filtering and routing calls with IVR technology. This enables businesses to ensure that only qualified leads reach call centers and are routed locally, allowing marketers to successfully manage resources and maximize ROI.

Many companies include call filtering and routing processes in their phone marketing campaigns, but most have not yet integrated these processes into their call tracking systems, which ideally include detailed analytics that support lead scoring and campaign optimization. Those who track, analyze and optimize calls are ahead of the game, but there is an even better way to extract the most value from the campaign through call marketing automation. The next step for the savvy marketer is to generate more of the most valuable calls through syndication.

With syndication, marketers can establish complementary partnerships and increase distribution, using a syndication provider's technology to bundle and distribute offers with their existing platform. With the right provider, this process doesn't require IT support (and the budget hit that entails). Marketing operations can easily and quickly accomplish syndication using intuitive tools.

The right syndication partner allows marketers to move beyond call tracking and effectively manage operations on a single, easy-to-use platform, growing their business through call marketing automation.

A comprehensive solution should include the following elements:

- pay-per-call campaign creation and management;
- comprehensive call tracking, including keyword, traffic source and other metrics;
- click-to-call capabilities;
- call analytics and real-time reporting;
- true comprehensive ROI optimization; and
- search keyword call services.

This type of solution can be efficiently delivered via cloud technology, enabling the marketer to maintain complete control of the campaign at their fingertips, in real time. It includes call tracking, but that is just one of several elements, including quality filtering and routing, detailed analytics and, most importantly, distribution syndication to generate more valuable calls.

In today's competitive environment, marketers must find new ways to improve ROI and drive qualified leads to their business. A call marketing automation strategy can be the ideal approach. Marketers who value phone calls and want to grow their business should move beyond call tracking and generate the maximum return on their call marketing investment with call marketing automation.

Jason Spievak is the CEO of RingRevenue Inc. (www.ringrevenue.com).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by Elaine Cascio

Conquering Channel Chaos

Faced as we are with a wealth of customer communications channels, it's very easy for them to get away from us. For many of us, it's time to take a deep breath and get control of channel chaos. Here are a few tips to help you connect better with your customers across – and between – channels.

Understand your customers or customer segments and what channels they prefer.

We all assume that younger customers prefer self-service channels and older ones prefer speaking with an agent, but that's not always the case. Look beyond age to understand both channel use and channel preferences for your different customer segments. Companies segment customers in many different ways – by demographics, customer value, where they are in the relationship lifecycle, or a combination of factors.

Lifecycle mapping helps us to look at specific customer segments and how we can be improving the customer experience for them. And developing user profiles lets us test how effective channels are for them at key moments of truth. Most importantly, talk to your customers to identify preferred channels.

Have a multi-channel strategy to leverage the strengths of each channel. A key driver in conquering channel chaos is a clear and aligned multi-channel strategy. A multi-channel strategy provides a framework for making channel decisions. It enables us to optimize use of all channels based on a strategy that ties back to corporate vision and goals.

Understand the strengths of each channel and what's appropriate on a channel-by-channel basis. Don't feel that you need to offer every possible application in every channel. A retirement projection application that works brilliantly online or as a mobile app is tedious and frustrating using voice self service. That's because it's an application that lends itself to a visual interface.

Eliminate the need to channel hop – or provide it seamlessly. There's nothing more irritating than starting a transaction on the web and reaching a dead end – then switching to another channel and having to start from scratch. This is one of your customers' biggest frustrations with channel chaos.

Customers should be able to complete their business on their channel of choice. I realize that may not always be possible – so we must make transitioning between channels as seamless and effortless as possible. One key is understanding what occurred on other channels so that you're not asking a customer to repeat a task multiple times. Another key is making the cross-channel customer experience natural and easy. This can be as simple as moving from an IVR to an agent where the agent knows who you are and what you were doing in the IVR and can pick up the ball. Multimodal capabilities also support transitioning between channels in ways that eliminate any effort on the customer's part.

Channel Strengths and Weaknesses

	Web	IVR	Text	Mobile	email	Kiosk	Mail /Fax	Ass't Svc	Social media	Agent
Immediate, time critical	✓	✓	✓	✓				✓	✓	✓
Location independent	✓	✓	✓	✓	✓			✓	✓	✓
Input/deliver complex data	✓			✓	✓	✓	✓	✓		✓
Simple transactions	✓	✓	✓	✓		✓				✓
Multiple questions	✓			✓	✓	✓	✓	✓	✓	✓
Outbound alerts	✓	✓	✓	✓	✓		✓		✓	

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Make the customer experience consistent across channels. Although you won't have identical applications across channels, and there will be variations in voice and data channels, be consistent in how information is presented and processed, branding and the tone of the user interface. Most importantly, make sure that data is consistent across channels.

Good luck conquering your channel chaos. Your customers will thank you for it.

Elaine Cascio is a vice president at Vanguard Communications Corp. (www.vanguard.net), a consulting firm specializing in customer experience, self service, contact center processes, operations and technology.


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by John Meyer

Thinking Outside the Office

Virtual Model Opens New Opportunities for Specialized Service

Customers serving customers – it's one of the biggest advantages of outsourcing to a company that operates within a virtual environment. While it is true that virtual call centers provide cost savings, efficiency and flexibility not found in traditional brick-and-mortar centers, it is their unique ability to align the skills of call taking contractor with the company programs they service that has convinced so many companies to adopt the outsourced virtual model.

Utilizing home-based, customer service professionals who are themselves consumers of a client's products and services allows virtual call centers to offer clients a higher level of customer care. However, the secret to finding the right agents lies in a network of small businesses with access to the nation's largest talent pool.

Untethered by Geography

Companies concerned with delivering top-notch customer care understand that it all begins with clearly defining the type of service professional best suited to assist their customers. Some companies mistakenly believe it is better to keep their talent qualifications broad to encompass the largest number of possible agents. In reality, however, narrowing the focus by requiring specific skill sets can actually result in higher service delivery and lower overall costs.

Consider, for example, how much more effective the interaction would be between a call center professional who loves to travel and a caller booking a cruise. Or, imagine a military veteran helping another military veteran. How about people with medical billing, coding and insurance processing experience assisting customers with health care service issues? From industry certifications and work experience, to language skills and even geographic locations, the more detailed, the better.

Once the desired qualifications are defined, leading virtual contact centers are able to scour North America to find small businesses with access to talent that exactly matches what their clients need. The virtual model gives these business partners the unique ability to tap into resources that otherwise may be unavailable for traditional outsourced service positions, such as graduate students, teachers, stay-at-home parents, semi-retired professionals, military veterans or other highly capable people with professional backgrounds who require work flexibility. Some companies even have programs tailored to source from specific segments. For example, Arise Virtual Solutions has a military sourcing program, which encourages veterans, active members of the US Armed Forces and military spouses to establish their own small businesses and provide contact center services from home.

Another sourcing advantage of these small businesses is that they are not limited to finding talent within a certain geographically region. This is a contrast to traditional brick-and-mortar centers, which typically must source agents living within a 20-mile geographic radius of a physical office.

Aligned Interests

Using small businesses to provide virtual, on-demand, customer care services is a revolutionary solution that benefits all sides. First, because small business owners choose the client program they want to service, they are highly motivated to deliver quality results to maintain the service schedules. Also, because the agent is often the small business owner, he or she has a vested and direct financial interest in providing the best service possible. For customer care professionals, working on a client program in which they have a high brand affinity and intimate product knowledge, combined with the flexibility of working from home, provides intrinsic motivation to deliver outstanding results.

Finally, for the client outsourcing customer service, the virtual model provides exceptional cost savings and operational efficiencies. With limited sourcing costs, faster ramp to proficiency, quicker ability to flex the pool of service providers to field unplanned increases in call volume and higher first time resolution metrics, to name a few, virtual call centers clients benefit from improved financial results and high levels of customer satisfaction.

John Meyer is co-chairman and CEO of Arise Virtual Solutions Inc. (www.arise.com).

by Paula Bernier

Talking with Servion

CUSTOMER magazine recently spoke with Shankaran Nair, president of corporate strategy at Servion, about trends and developments in the customer experience arena. Here's an excerpt of that conversation.

What challenges do companies face when expanding internationally in regards to call centers and customer service personnel?

Nair: I find the question open to a couple of interpretations and I am going to respond based on the assumption that the company is planning to move its call centers/customer service personnel overseas to service a domestic market. The question comes at an interesting time when we are beginning to see reports of a phenomenon that is being called reshoring – a move to bring jobs moved overseas back home. [That includes] jobs cutting across manufacturing to service jobs including customer service. The question also deserves considerations across a spectrum of analysis ranging from culture and strategy to cost and labor arbitrage. If I were to list the challenges I would go through the following thought/questions;

How central is my customer to my organization? This sounds like a very foolish question, but one of the stated drivers of the reshoring movement of customer service is apparently that companies are discovering that service is core to their

"Every time a customer calls in I would want the organization to see it as an opportunity to strengthen that oh-so-elusive emotional connect with the customer. Not to sell him or her stuff please."

– Servion's Shankaran Nair

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strategies and culture and should indeed be kept in house at all costs. The fact that it has taken 15 to 20 years for this thought to sink in is itself debate worthy. But, for the moment, suffice it to say that every organization intending to offshore customer service jobs needs to be extremely comfortable with the thought that [it is] indeed handing off a very core part of [its] organization to a relative stranger.

At what level of financial gain would I go ahead and take that risk? The core driver of offshoring was labor arbitrage. Cost savings in service jobs was reported to be around 80 percent (cost difference between U.S. jobs and Indian jobs) at the start of the offshoring cycle. This is today down to less than 40 percent, and perhaps as low as 25 percent. Organizations would do well to look at a cost benefit analysis here – and a challenge would be a realistic assessment of the cost of offshoring these jobs. What would you include in costs and how? Customer churn? Sliding CSAT scores? What mechanism would you put in place to track these against actual savings over a period of time?

A related and sequential question is: How does an organization assess customer reaction to being serviced from outside the country? Historically no organization that I know of did any such prior research with customer control groups assessing this risk. What is going to be the impact of strange accents and different cultural attitudes when an agent sitting in a faraway land meets my customer on the phone?

Summarizing: First get comfortable with the thought. Then assess the risks. And then the benefits. None of this is easy to do.

How do you decide whether your company should institute a call center/customer service hub in each location or if well-trained employees should be hired in existing locations?

Nair: My belief is that an agent/customer service professional should ideally be as close to the customer as possible culturally speaking. In an ideal world with other things being equal (salaries in different countries, cost of carrying calls) I would want agents within the country for that reason. And it would take a powerful set of market dynamics to persuade me otherwise – for example such a vast difference in cost that I cannot even conceive of commanding a premium price for my product/service due to the superior customer service I offer in the home country.

So if the company itself is attacking new markets in different countries I would believe that it should have its service hubs within that market in spite of the fact that by definition they would have to hire and train a completely new bunch of people. The problem of newness is relatively easier to fix by having a core group of existing trained people lead the training effort in the new country, then the problem of trying to get existing employees from a different nation to understand the nuances of culture in a new country.

My personal, and unapologetic, opinion is that a company should hold its customer service people and mechanisms as close as possible within itself and as close as possible to the market it is servicing where the market is defined as within a national boundary. There are countries where even simply being within the national boundary still poses severe cultural and language challenges due to the sheer diversity of the country itself.

Can technology play a factor in making this transition easier?

Nair: Of course it can. The question really is how to make it do that. The truth is that the increasing use of technology has not been accompanied by a corresponding rise in customer satisfaction whether or not the service locations are in country or outside. In fact arguably quite the reverse if the proliferation of reports about increasing levels of customer angst with service are to be believed.

To my mind this question, that of the use of technology to simply deliver the desired level and quality or service, deserves consideration as a stand-alone. Let me reverse the question: If the use of technology has not delivered quite acceptable results with in house in country customer service, why should we believe that it can do so when service personnel and locations are thousands of miles away? I recognize I sound cynical, but the point is the proper use of technology for delivering the promised brand experience is a conundrum we need to crack rather urgently. And when we do that it will certainly take away some of the uncertainties and challenges of moving service jobs and locations to far away locations.

Technology is culture neutral (to an extent – there are cultures and customers in parts of the world who are less ready to adopt technology to serve their purposes) and to the extent routine matters can be handled using technology. Apart from which, the use of capabilities like CTI can definitely furnish real-time information to narrow the gap of understanding an agent in a foreign land may have of the customers of an organization.

At Servion we believe that each brand has to deliver the promised experience at the service point. We call this Customer Experience by Design. We also believe organizations need to follow a step-by-step process to translate a brand strategy to a service strategy and then break that service strategy into component design elements of people, process and technology. Following this step-by-step process necessarily means the question of where to locate customer service occurs at a later stage by which time the service strategy as mandated by the brand strategy very probably has already answered that question.

How do you get past what some consider the stigma of foreign call centers, particularly those in India?

Nair: I would want to first understand where that stigma exists. Is it in the mind of my customer? Because if it is, the only way to get past it is to deliver the promised and

> "My belief is that an agent/customer service professional should ideally be as close to the customer as possible culturally speaking."

expected experience time after time till my customer erases that stigma through personal experience.

That is a tough task and a long-term process. I cannot see any quick fixes as being available.

If the stigma is within the minds of the management or senior employees in the company and not in the minds of my customers, it is relatively easier to fix. A process of education and exposure to the quality of services being offered and consumed should fix that.

What are the cultural differences that must be accounted for to be successful?

Nair: Various layers of cultural difference.

For example, in a highly male-dominated society, how would a male call center agent deal with a troublesome woman caller? Or vice versa? [There are] cultural differences as reflected not merely in the ability to speak a language but being comfortable in the nuances of its usage. [There also are] cultural differences with regard to the use of technology and the readiness to adopt technology, and so on.

Even if call centers save money, are the savings worth it if customers are being annoyed?

Nair: No!

Actually the question begs another question. Even if customers are not being annoyed, who is going to be brave enough to quantify the size of the opportunity missed to have a conversation with the customer? Every time a customer calls in I would want the organization to see it as an opportunity to strengthen that oh-so-elusive emotional connect with the customer. Not to sell him or her stuff please. Just to please him or her extraordinarily. Who is even factoring that opportunity loss into these calculations?

by Amanda Ciccatelli

Customer Service is Key to Phone.com's Success

The desire to create and grow a business, no matter the size, requires a combination of character, talent, vision, energy and timing. One entrepreneur who had just the right mix, CEO Ari Rabban and his partners Brian Scott and Michel Mann, created a successful 21st century phone company, Phone.com, but Rabban had one special ingredient: exceptional customer service.

Today, Phone.com's customer service team run by Jeremy Watkin, director of customer service and sales, is focused on supporting the unique needs of small businesses and entrepreneurs. Phone.com provides cost-effective access to the communication services needed to run a global business. It offers VoIP and cloud-based telephone service, specializing in small-sized businesses and home offices, as it operates its own private cloud for hosting and telephony.

According to Watkin, the most important aspects of growing a business from a customer service standpoint are quality and accessibility.

"It is really all about making our product accessible to the customer, making our website simple and easy to use," he told CUSTOMER magazine in a recent interview.

Additionally, Phone.com's customer service department truly differentiates itself from others because it is U.S.-based and truly focuses on being fun, with real people talking to real people.

"We don't overly script our customer service processes. We want to connect with our customers and find real solutions for them and be honest enough with them so that if [we] don't have a solution for them we tell them," explained Watkin.

To meet its customer phone system needs better, Phone.com will do whatever it can to make that happen. In fact, according to Watkin, Rabban, Vice President of Channel Development Joel Maloff, and Executive Vice President and CTO Alon Cohen all bend over backwards for their customers. Even if it takes them out of Phone.com's core offering of products, they want to figure out how to do business with people.

Over the years, Phone.com's customer service has significantly grown. Recently, the company started the Communicate Better Blog, dedicated to talking about customer service, learning about customer service, introspection on how Phone.com is improving its customer service, its customer service styles as well as networking with other people in customer service.

"We are just trying to make a difference in the world of customer service, which definitely needs it," he added.

Looking into the future, Watkin wants to see Phone.com customer service continue to be simpler, so that it's easier for customers to access Phone.com and get fast responses.

"I think the fact that we have a great team of people that really understand our service and our product, it's a huge link for people that might be confused or need help," said Watkin.

> "We are just trying to make a difference in the world of customer service, which definitely needs it."
>
> – Jeremy Watkin

In fact, he and his team do a monthly report called the "Communicate Better Report" which includes customer feedback.

"There is tons of great feedback, but I want there to be more. I want there to be 99 percent great feedback and one percent people complaining," he added.

Watkin and his team also recently started a customer service Twitter handle @ phonecomsupport.

"It's a fun, new way for customers to reach Phone.com. I wanted to make us more accessible," he said.

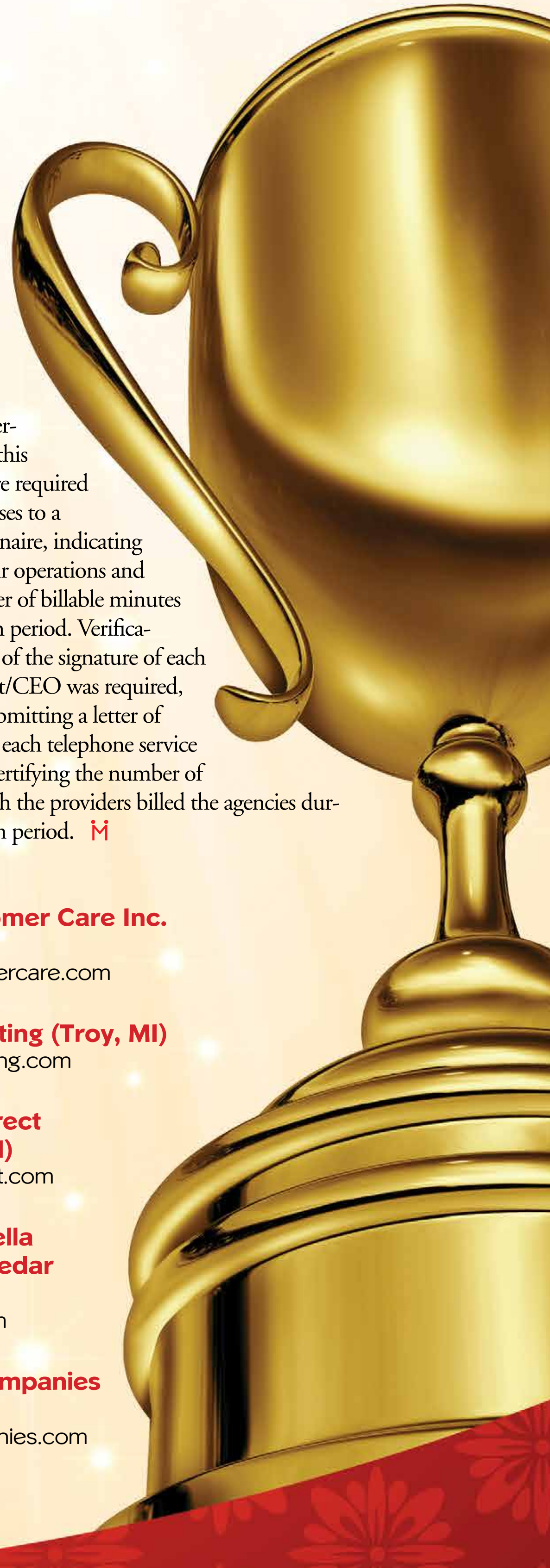
He explained "Customer service can be a job that can really wear on people, and it's important to inspire and make them realize that they have an opportunity to make an impact on people's lives just by making their day better."

Amanda Ciccatelli is web editor at TMCnet, the online entity of CUSTOMER magazine parent, TMC.

by Erik Linask

TMC Presents Top 50 Teleservices Providers

At the start of the second quarter of each year since 1986, TMC has delivered its Top 50 Teleservices Agency Ranking lists. In this issue, we are pleased to present the 28th edition, listing the top teleservices firms in the world.



Our rankings are derived from extensive detail gleaned from an exhaustive application process in which teleservices vendors quantify their service delivery in terms of minutes usage in their various call center locations. Through more than a quarter century of consistency in processing and evaluating applications, the Top 50 ranking has become the benchmark for businesses seeking high-capacity teleservices agencies.

Ranking Criteria

Because the primary factor in our rankings is agency size, based on annual call volume, we have always relied on measurable, third-party-verifiable data to determine our agency rankings. Specifically, agencies are ranked based on the number of minutes each was billed by each of its phone companies for telephone services for the previous 12 months.

Qualification

Qualifying teleservices agencies in this year's Top 50 were required to submit responses to a detailed questionnaire, indicating the nature of their operations and listing the number of billable minutes for the 12-month period. Verification, in the form of the signature of each agency's president/CEO was required, in addition to submitting a letter of verification from each telephone service providers used, certifying the number of minutes for which the providers billed the agencies during the evaluation period.

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1. Teleperformance USA (Holladay, UT)
www.teleperformance.com

2. DialAmerica (Mahwah, NJ)
www.dialamerica.com

3. Alorica (Chino, CA)
www.alorica.com

4. Agero Inc. (Medford, MA)
www.agero.com

5. Telvista Inc. (Dallas, TX)
www.telvista.com

6. American Customer Care Inc. (Bristol, CT)
www.americancustomercare.com

7. Dialogue Marketing (Troy, MI)
www.dialogue-marketing.com

8. TeleServices Direct (Indianapolis, IN)
www.teleservicesdirect.com

9. Thomas L Cardella & Associates (Cedar Rapids, IA)
www.tlcassociates.com

10. The Results Companies (Dania Beach, FL)
www.theresultscompanies.com

11. Synergy Solutions Inc. (Phoenix, AZ)
www.synergysolutionsinc.com

12. AnswerNet (Willow Grove, PA)
www.answernetnetwork.com

13. Ameridial Inc. (North Canton, OH)
www.ameridial.com

14. 24-7 Intouch (Regina, SK)
www.24-7intouch.com

15. Telerx (Horsham, PA)
www.telerx.com

16. The Connection (Burnsville, MN)
www.the-connection.com

17. USA800 Inc. (Kansas City, MO)
www.usa800.com

18. NOVO 1 (Forth Worth, TX)
www.novo1.com

19. Ansafone Contact Centers (Santa Ana, CA)
www.ansafone.com

INTERNATIONAL

1. Teleperformance (Paris, France)
www.teleperformance.com

2. Teleperformance USA (Holladay, UT)
www.teleperformance.com

3. Telvista Inc. (Dallas, TX)
www.telvista.com

4. TeleServices Direct (Indianapolis, IN)
www.teleservicesdirect.com

5. 24-7 Intouch (Regina, SK)
www.24-7intouch.com

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www.agero.com

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www.vxi.com

9. AnswerNet (Willow Grove, PA)
www.answernetnetwork.com

10. The Results Companies (Dania Beach, FL)
www.theresultscompanies.com

11. Telerx (Horsham, PA)
www.telerx.com

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1. Teleperformance USA (Holladay, UT)
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www.alorica.com

3. VXI Global Solutions Inc. (Los Angeles, CA)
www.vxi.com

4. DialAmerica (Mahwah, NJ)
www.dialamerica.com

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www.telvista.com

6. The Results Companies (Dania Beach, FL)
www.theresultscompanies.com

7. The Connection (Burnsville, MN)
www.the-connection.com

8. Agero Inc. (Medford, MA)
www.agero.com

9. USA800 Inc. (Kansas City, MO)
www.usa800.com

10. Telerx (Horsham, PA)
www.telerx.com

11. AnswerNet (Willow Grove, PA)
www.answernetnetwork.com

12. American Customer Care Inc. (Bristol, CT)
www.americancustomercare.com

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www.synergysolutionsinc.com

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www.24-7intouch.com

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www.ameridial.com

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www.novo1.com

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www.tlcassociates.com

18. **Ansafone Contact Centers (Santa Ana, CA)**
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19. **Dialogue Marketing (Troy, MI)**
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20. **TeleServices Direct (Indianapolis, IN)**
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1. **Teleperformance (Paris, France)**
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www.vxi.com

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www.24-7intouch.com

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www.teleperformance.com

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www.vxi.com

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7. **DialAmerica (Mahwah, NJ)**
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www.vxi.com

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Deriving Value from Skills-Based Routing:

A Guide to Implementing Skills-Based Routing Effectively

Justifying a technology investment in a contact center comes down to understanding the solution's applicability and how it can benefit agents, customers, and the business as a whole. Skills-based routing can lend to better business performance by improving agent performance and the customer experience, particularly when routing plans are implemented wisely and maximized by best practices.

In planning for skills-based routing, the first step is to determine the types of skills that contact center agents possess or must acquire. Depending on the organization, the industry it serves, and its processes and requirements for customer care, agent skills fall into four principal classifications.

- **Proprietary skills**, which require training specific to products or services such as billing, scheduling, reservations, or parts. These are the most common skills among agents.
- **Technical/industry skills** reflect an agent's expertise and often require special training, such technical troubleshooting (Tech Support or Help Desk), language proficiency, or professional licensing (insurance, financial brokerage services, etc.). While these skills are highly specialized, they are not always unique to the organization.
- **Behavioral skills** include skills important for relationship management, such as an agent's demeanor that's direct and to the point in contrast to one that is patient and nurturing. Typically, behavioral skills are not applied outside a relationship-based model.
- **Passive skills** are assigned by the organization and are transparent to the agent and customer. These skills usually pertain to geographic alignment or team assignment.

After concluding which skills are relevant to the business, the next step is to determine if those skills can be taught or if agents possessing the skill should be hired. Scale is also a key consideration, although there is no prescribed size a contact center must be to take advantage of skills-based routing. (Note that, in a small contact center, skills-based routing can segment a smaller operation and inhibit the nimbleness of agent resources.)

In the same manner as assessing agent skills, evaluate existing contact center, customer care, and business operations thoroughly. Thereafter, perform a gap analysis to understand barriers that might hinder arriving at the wanted state. It is at this point that the contact center can demonstrate how skills-based routing delivers measurable value to the business.

Best practices

Rule #1: Ensure that the routing plan is relevant — and simple to manage. That is, a plan should be free of excessive design complexity, and should provide transparency within workflows as to how and why interactions traverse specific decision points. The following best practices can help.

Design routing plans in a practical, appropriate manner
High priority customers are a good example. It's common to offer service that includes routing such customers to a dedicated agent. But if the agent is unavailable, interactions queue for a larger subset of agents for a set duration, and the routing design can force unnecessary hold times. By instead queuing a priority customer's interaction for all agents with the wanted skills, the rate of immediate answers increases, average speed of answer and abandons decrease, and the quality of service remains neutral.

Make routing beneficial for the customer
Either the customer should realize the implicit value of skilling, or skilling must contribute to improved management of the operation and customer care benefits. When a customer calls about billing, for instance, the logical process is to connect that customer to an agent with expertise in billing. Another example is geographic alignment to ensure that a customer calling from the Eastern Time zone connects to an agent in the same time zone. Or, if billing rates vary by geography, routing by geographic alignment makes sense — the customer connects to an agent with expertise in billing, within the wanted geographic region and time zone.

Keep maintenance from becoming overwhelming
Again, simplicity in the final routing design is imperative. A best-practice guideline for conditional routing is to select the variables directly tied to business objectives or measures of success. For example, if dynamic routing is based on service level objectives, design one call flow for typical operations and another that triggers a contingency plan when a service level falls below the target. When service levels are within the acceptable range, interactions should be directed to the agents considered primary for the skill. In a contingency scenario, interactions should target all resources possessing the required skill, regardless of proficiency.

To ensure that routing options provide a consistent experience no matter which channels a customer uses, contact centers must design any routing plan with attention to detail, and simplicity.

Consider the agent experience

Involve agents and get their buy-in for a skills-based routing model by following a few simple best practices. These practices also contribute to empowering agents and building morale.

1. Distribute interactions equally
2. Set a career path for agents
3. Limit the number and types of skills an agent can possess
4. Offer transparency and set expectations for each agent
5. Adhere to a quality program
6. Determine agent proficiencies using clear qualifying criteria

As with any enhancement or upgrade to a contact center process, there are always challenges to overcome. Skills-based routing is no different. To ensure that routing options provide a consistent experience no matter which channels a customer uses, contact centers must design any routing plan with attention to detail, and simplicity.

Download the complete whitepaper to learn more:

Deriving Value from Skills-Based Routing: A Guide to Implementing Skills-Based Routing Effectively

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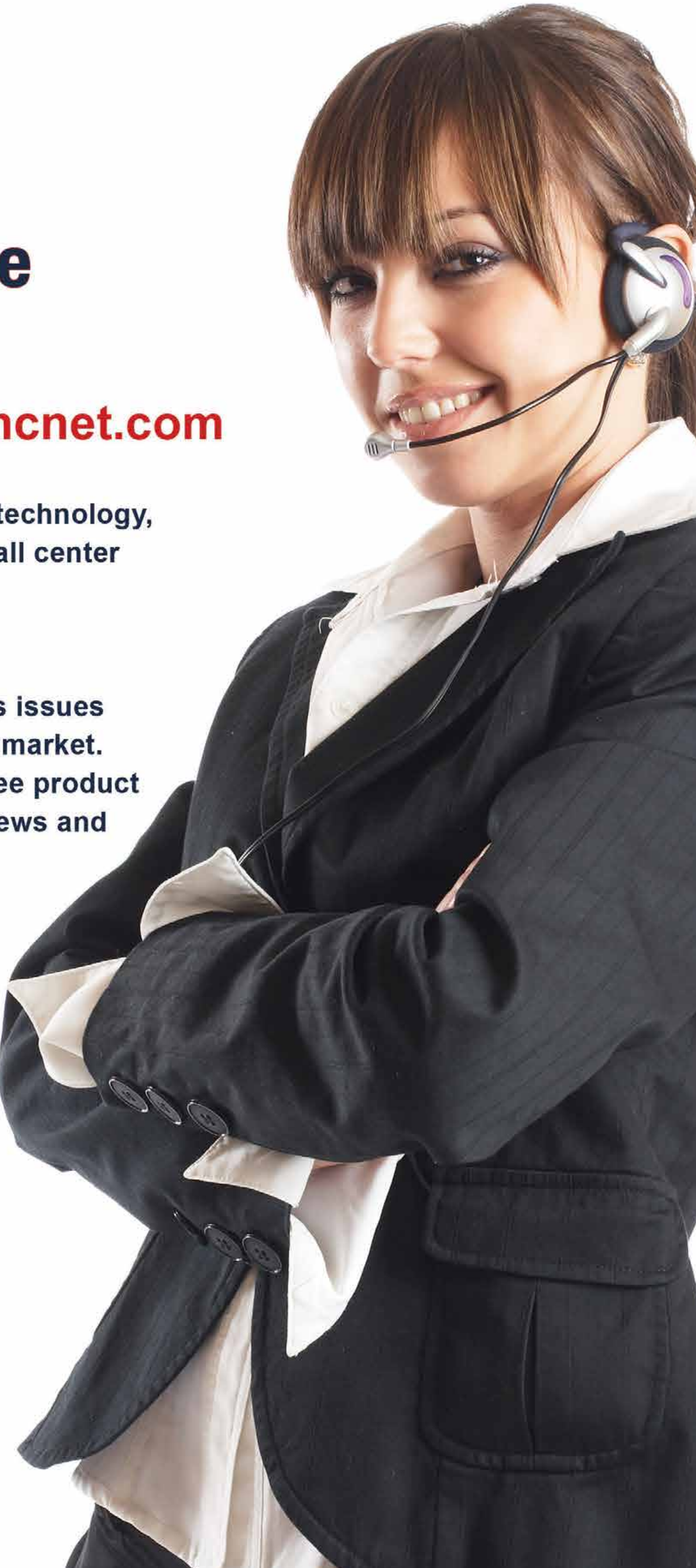

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Erik Linask,
Group Editorial Director, TMC

Social Disclosure: Is the FTC Serious?

I remember when, back in 2009, I had to let all the people who write or blog for TMC know about the FTC then-new rules regarding disclosure of paid reviews and the nature of product results compared to the norm. (I was in Arizona for AstriCon at the time.) I also remember the response from some of the blogosphere about how insane that was.

The fact is, in an eEverything world, where traditional limitations on space don't exist, and where reach is extended to anyone with broadband access, smart marketers and sales teams will look for every opportunity to maximize impressions. That means leveraging unsuspecting readers' thirst for the latest hot information to promote their product – in many cases, leveraging a recognized personality to attract attention. I mean, outside of Cleveland residents, who wouldn't buy a Samsung Galaxy Note II after hearing how much @KingJames loves it?

Understanding the nature of the marketing and advertising business is hype – not necessarily full disclosure – the FTC has appropriately taken its mandate to the next logical level, applying its principles to the eWorld of social media and mobile advertising. This, from the latest FTC guidance, its .com Disclosure Report:

> "The general principles of advertising law apply online, but new issues arise almost as fast as technology develops — most recently, new issues have arisen concerning space-constrained screens and social media platforms."

What the document points out is that, while bloggers can easily note they are providing a paid review or promotional post, online advertising and social media elements have much less real estate with which to deliver "truth in advertising." Within their allotted real estate, ads and other promotional elements must indicate they are such and, in cases where above average results are being promoted (weight loss, energy efficiency, cost savings, etc.), "typical results" must also be indicated – no longer is it simply enough to note that results in the promo are above average.

Putting this into perspective, what the FTC is now mandating is that, in addition to small online ads having to ensure accuracy of information, @KobeBryant and other celebs who regularly promote brands via their tweets and posts, must indicate they are being paid to promote those devices, shoes, and other products.

So, instead of tweeting, "Rockin My fav Js at the dunk contest #spriteslam pic.twitter.com/rBujaANU," you can expect to see from Kobe: "Ad: Rocking my fav Js at the dunk contest #spriteslam (avg Nike purchaser doesn't play BB after high school)."

Or, you can expect LeBron to write: "(paid) I'm still rocking my #galaxynote2 just wanted to share a screenshot I got to celebrate my cousin's skills... he's nice with it!....(Samsung does not make me a better player)"

I think not.

It's not likely that social media users are going to start abiding by these guidelines – and perhaps the FTC mandate isn't actually meant for these situations. But, the truth is that Kobe, LeBron, and so many other celebrities make the majority of their fortunes through endorsement deals. So, where does the line get drawn? What if Shaquille O'Neal actually likes his Buick Lacrosse? Does that mean he isn't able to tweet about it without identifying it as an advertisement?

While, in principle, I don't disagree with the FTC's intentions, social media is, by definition, interpersonal interaction and, at some point, we have to allow people to be either intelligent or not. Let's face it, Shaq doesn't really fit into the Lacrosse so, a tweet about how much he loves the car, regardless of how much he smiles, shouldn't carry much weight.

But, why is it unreasonable to think any of these three athletes does like their Nike footwear? After all, they wear them for a living – try playing any sport with shoes that are uncomfortable.

The point is twofold. How can anyone determine when tweets and Facebook posts are more advertising than reality? Also, who is going to monitor social media to ensure these guidelines are being followed? And I haven't even touched on the idea of retweets and other republication, which the FTC guidelines also address.

Do I like the fact that we now have to deal with social media spam? Absolutely not and, in theory, I agree with the FTC's motivation. But, it is all part of the world Zuck and @Biz have created for us – and with our participation in such social channels comes a certain responsibility to behave intelligently – both when posting and reading. The FTC will be better off focusing on advertising methods it actually is able to monitor and let social be just that – social.