



# CUSTOMER<sup>TM</sup>

Volume 31/Number 10 • July/August 2013

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## The Father of Customer Satisfaction

**ACSI creator Claes Fornell talks  
about the customer experience.**

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**Rich Tehrani,**  
CEO, TMC

## How Apple Lost Control of Its Branding

**T**he one thing Apple does better than any other tech company is name products and technologies in an easy-to-understand manner. iPhone, iTunes, iPod, you get the idea.

Sure, there are some exceptions, like adding an S after some of the iPhone iterations. That doesn't seem to make much sense. But perhaps the worse offense is the branding of the 3rd generation iPad. Instead of calling it the iPad 3, it was called The New iPad.

The point is, the name was stupid. It was certainly different and caught us off-guard, but sometimes thinking different is thinking incorrectly. The issue is exemplified by an e-mail from Rakuten (formerly Buy.com), which refers to the iPads as 3rd and 4th generation instead of the

imagining a soccer parent at Starbucks being asked "Which iPad is that?" and responding "I'm not sure – the latest one I think."

The reason this is a missed opportunity has to do with the comparison to the iPhone product line. Oh, you have an iPhone 5? I have an iPhone 3. I guess I need to upgrade.

And what happens with the next iPad? Will it be the iPad with Retina+? Will it be the iPad 4S? Or how about calling it The New iPad again?

When you have a good thing – like naming conventions that work – why do you need to mess around with it? Anyone have an answer? Because if you do, it will explain

proper name Apple picked for these devices.

Even now, Apple refers to the latest iPad as the iPad with Retina Display. Do you really think this is easy to remember? If you go through the trouble of coming up with a name like Lightning for your power adapter, why do expect your customers to remember that their iPad is the one with Retina Display. I am

why Apple made the decision to lose control of its branding. The question is, will the company learn from its mistake? **M**





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**Paula Bernier,**  
Executive Editor

## Think Different

**T**he words in the headline above once served as the ad slogan for Apple, which of course changed the tech world as we know it. This slogan came to mind as I started writing this piece, which will discuss two disruptive customer-related concepts, both of which have been introduced by gents named Matt.

Let's first turn our attentions to Matt Gorniak, COO and co-founder of startup G2 Crowd, which is unleashing a new rating system that – in the company's own words – it hopes “will spell the end of Gartner's Magic Quadrant.”

Gorniak says these reports have lost their magic in an age in which people want input and opinions from real users as opposed to one or two analysts who have probably never used the software being assessed.

“Buyers don't really want to hear from the analysts, but it's a crutch from the '80s,” says Gorniak.

What's more, he says, the Gartner Magic Quadrant model is no good for the vendors in the markets it considers either because it's costly for those companies, which he explains have to buy access to the analysts.

“No one really knows why they are where they are” in the Magic Quadrant reports, he says, adding they often contain some companies that also have multimillion relationships with Gartner.

Gorniak knows all this because he experienced it firsthand while at his former employer BigMachines, which he says spent \$75,000-80,000 on the Magic Quadrant.

A better way to assess the players in such markets as CRM and marketing automation is to go straight to the sources – the companies and individuals using these solutions, says Gorniak.

“We're in a social world now, and it's easy to identify experts,” he notes.

To enable that, G2 Crowd is building a

trusted site for software reviews. Those with experience are invited to log in to the site through LinkedIn to rate and review select software. That way, readers can see the profiles of those doing the reviews. And the site has built-in logic that excludes employees of the software companies under review, as well as their competitors.

G2 incents people to do the reviews by offering iPad Mini giveaways and providing a gamification system that can help reviewers publicly position themselves as experts in a field if they are prolific and do reviews that are well received by the target audience.

The Grid, which is the name of G2's offering, leverages real-time algorithms and big data to rank vendors into quadrants based on reviews from the site. Vendors will be ranked as “Leaders”, “Innovators”, “Challengers” and “Caution.”

Casual visitor can browse categories for free, and G2 Crowd will provide for sale summarized reports and spreadsheets. CRM and marketing automation are the first product categories G2's Grid, which launched in beta this February, will address.

Now I'd like to talk about Matt McNerney, president at Ipsos Loyalty, Research & Consulting, who did a presentation titled “What is the Wallet Allocation Rule?” at Allegiance's May VoCfusion event in Las Vegas.

McNerney noted that there's been plenty of customer satisfaction talk and work in recent years, and that's great. But he indicated that in today's competitive marketplace, customer loyalty

isn't enough to succeed; it is important to grow share of wallet.

Fewer than one in 20 companies achieve consistent business growth over a period of five years, he added, yet all companies are asked to achieve good growth each year. That means that they either need “more yield or more field.”

Most managers believe better Net Promoter scores result in better business performance, he added, but that alone doesn't translate into increased wallet share. To illustrate this point he noted that Kmart reported its highest customer satisfaction rate the same year it filed bankruptcy. Meanwhile, WalMart had an initiative to improve the appearance and aisle width in its stores, which did make customers happier, but didn't ring up more sales, he said.

What organizations should be doing is looking not only at customer satisfaction but also at the competition, and their own rank in the market, he said, adding that Ipsos offers an online tool called the Wallet Allocation Optimizer to help them do the math.

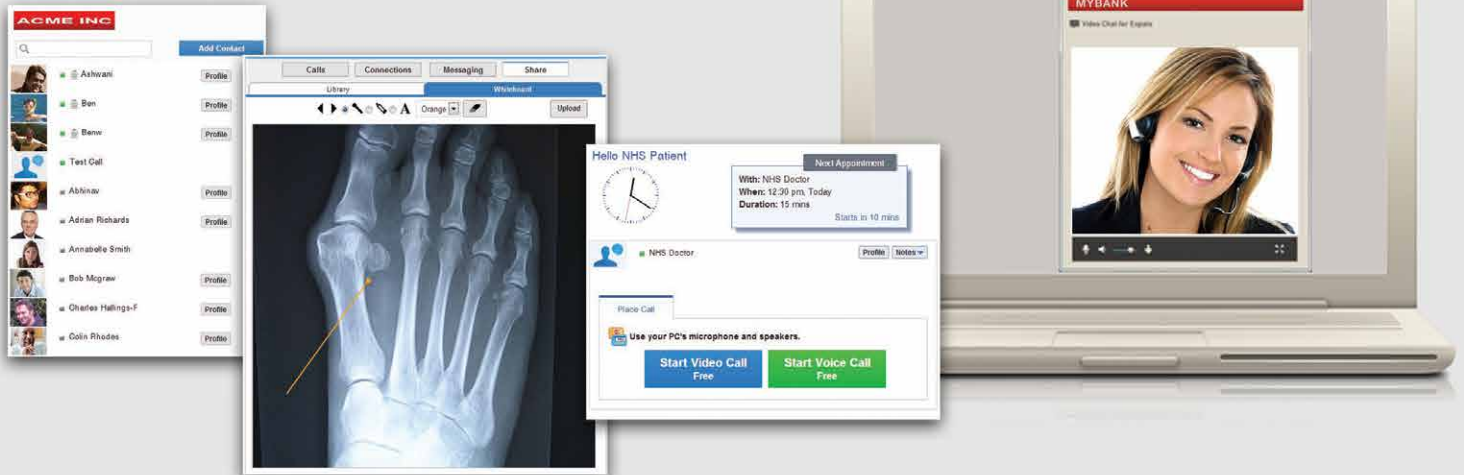
“You don't have to change the metrics you're using, you just have to use them differently,” he said.

For example, it would be very helpful for a store to know that only 3 percent of its customers shop there for beauty products exclusively. That means there's a huge opportunity there to bump up sales for beauty products. Armed with this information, the store might want to assess its beauty production selection and pricing, which if adjusted could increase the brand's rank and per customer spend in this category. **M**

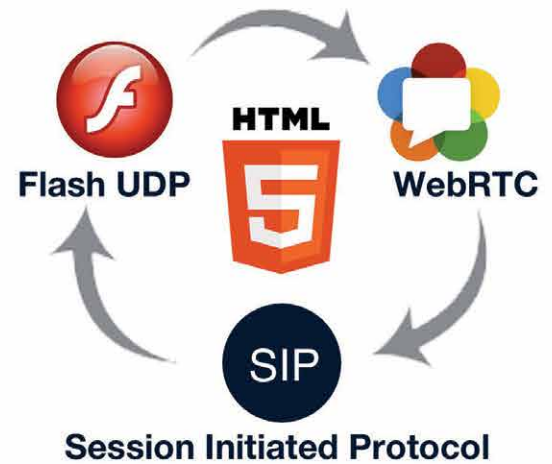


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# The Father of Customer Satisfaction

## ACSI Creator Claes Fornell Shares His Thoughts on the Customer Experience

**C**ustomer satisfaction has become a central focus for businesses today. But Claes Fornell became interested in customer satisfaction before it became a hot topic. Fornell is the creator of the American Customer Satisfaction Index. He is also the chairman and founder of CFI Group, an international provider of customer satisfaction measurement technology services; ForeSee Results Inc., a customer experience analytics firm; and CSat Fund, a hedge fund that applies customer satisfaction data to stock portfolios. And he authored the book “The Satisfied Customer: Winners and Losers in the Battle for Buyer Preference”.

CUSTOMER magazine recently spoke with Fornell about the ACSI, the state of customer satisfaction, and why businesses should pay attention to this important indicator.

### **What factors does the ACSI consider in weighing customer satisfaction?**

Fornell: There are three categories of factors that determine customer satisfaction: price, quality and fit, with the latter the most important and the first the least important. Fit has to do with how well a product matches a customer's need or desires. Since needs and desires usually differ across consumers, the best way for a company to improve customer satisfaction is to target the right customers and to segment across different customers. The best way for a consumer to improve his or her satisfaction with a product or service is to make a good, well-informed choice.

### **What kind of questions are asked in the ACSI surveys?**

Fornell: In the ACSI, we ask three types of questions for the variable (the ACSI Index) customer satisfaction. (We also ask questions about things like quality and price that we use to explain the variation in satisfaction.) Satisfaction relative to expectations, relative to the buyer's ideal product, and also a general question about how satisfied the respondent is.

However, to the surprise of non-statisticians, what is critical here is not so much the questions, but that we can take raw data and mathematically refine it by calibrating the combination of responses such that its relationship to some objective (for the firm) is maximized. In the case of ACSI, this means that we combine the responses to the three questions into an overall satisfaction index in which the responses are weighted so that the index has the strongest possible effect on repeat purchase. Technically, this is done by maximizing the trace of the relevant covariance matrix (but few people will be able to follow the mathematics here) from the survey.

### **Of whom do you ask these questions?**

Fornell: Randomly selected buyers/users of the product in question. Sample size is determined by what kind of precision is needed for generalization and the degree of consumer heterogeneity, but if one has a good processing tool (in our case a latent variable structural equation system), about 250 responses for each company are needed.

### **Who uses ACSI's indexes and how?**

Fornell: The ACSI is used in a wide variety of settings, including the private and public sector, universities and stock analysts. How they use the ACSI differs, from benchmarking, improving customer satisfaction and profitability, to determining what stocks to buy.

### **You've been quoted as saying customer satisfaction is a leading indicator of a company's long-term market value and financial health. Explain.**

Fornell: The reason for that – there are several reasons. One is that most of the purchases we make, certainly in the services sector, are in one way or another repeat purchases.

If we're not satisfied, why would we go back and buy the same stuff again? We would only do that if the market wasn't very competitive – either there weren't alternatives or it was difficult to go to somebody else. So in a competitive marketplace, obviously it's critical to make the customer satisfied, otherwise he or she will go somewhere else and the company will lose that revenue probably. If you invest in companies with strong customer satisfaction, you do much better in the market. I've done that now for 12 years and have never lost in the market.

### **Does customer satisfaction tend to be more about the products themselves, or more about the experience involved in sales and service?**





ACSI inventor Claes Fornell

Fornell: The way we look at it, customer satisfaction is a summary measurement of all of those things. The whole customer experience is embedded in one number. Then you can break it apart and say was it the service person, was it the sales person, what was the contribution of each of those things, how much was product, how much was other things. Service becomes pretty important obviously.

**What do companies that have higher customer satisfaction scores have in common?**

Fornell: They deliver what they promise, and the buyer is reasonably well informed as to what that is. It's really two parts to this. One is the buyer and the buyer's responsibility for selecting a product or service that meets whatever needs and expectations that buyer has. The other part is on the seller's side to deliver like that.

**Which sectors do the best in terms of customer service and why?**

Fornell: A few companies do very well on customer satisfaction and many do less well. Some industries do well because it's a little easier to sell, let's say soft drinks, than it is to sell a mobile

phone in the IT sector. The ones that do well are the consumer nondurables, food products and the like. That's because they've been around a long time, and if I don't like Coca Cola I'm not going to buy it more than once. It's easy to switch. I don't need an instruction manual to use the products. I can open a can, and I can drink the stuff. There are really no surprises, and very little service is needed to consume the thing.

**Which sectors do the worst in terms of customer service and why?**

Fornell: On the other side of the scale here you have companies with much more complicated products where things are much more difficult. There they don't do so well in satisfaction. You can talk about subscription TV or airlines, [they] are not really there. Even the phone companies are much lower on customer satisfaction.

**Are they getting better?**

Fornell: They are getting better. In fact, there are very few that are getting worse as a category. We still see very low scores for cable and satellite TV, but they're not really getting worse, it kind of jumps up and down a little bit.

The airlines continue to have difficulties, but that's not a big surprise.

**What could the airlines be doing to improve customer satisfaction?**

Fornell: Some of the things they should be doing should be relatively easy. They should communicate what they know; information here is critical. They are very bad at this. When bad things happen, delays and the like, the airlines are getting a little better, but they're not really on top of things. They should let people know what to expect to the extent that they know it.

**The airlines have begun to send passengers e-mail alerts on flight delays.**

Fornell: Right, right, which is much better. In fact that happened to me yesterday. But it happened as I walked into the airport – I got the news that the plane was two hours late. Had I gotten that a half hour earlier I wouldn't have gone to the airport. Now I don't know the specifics of that situation, but I think they should communicate so that passengers should make other plans if they have to. And I'm still amazed in the plane itself. If you run into turbulence or whatever, the captain should say

something. Sometimes they do, sometimes they don't say anything. It's not consistent.

**Which companies and sectors are most improved in the area of customer satisfaction and why?**

Fornell: The whole PC industry, Apple led the way for a long time with its very high satisfaction, but also based on design and novelty that's where we've probably seen the most improvement over the years. You can see more industry-specific details on our website.

**But Apple's customer satisfaction is now slipping.**

Fornell: Yes. It started slipping in late summer or early fall, but not by a whole lot. For Apple the high satisfaction they've had has been terrific in terms of helping them. I think they've broken just about every sales record there is in this category. But they're having some difficulties now, and it will be interesting to see how that plays out. But I think when they overtook the industry 7-8-9 years now in customer satisfaction, it's been straight up since last fall. But they're still by far in the lead both when it comes to smartphones and the iPad and the laptop products. I think they have stalled. Who knows what the leadership change at the company has really meant. If you look at them they are seemingly at least somewhat less innovative than they were a few years ago.

**Does innovation impact customer satisfaction?**

Fornell: Oh sure. If you get a new, novel thing that no one else has and it's really packed with features that you like, sure.

**How does customer satisfaction relate to customer spending? If I increase my customer satisfaction does that mean bigger wallet share from that customer?**

Fornell: Sure. For many years we've had a very weak economic recovery. One thing is very very clear: weak consumer demand. And that puts a drag on employment and just about everything else. But the weak customer demand there doesn't come from low satisfaction, it comes from the fact that people have no money – the cash flow to households is not really what it should be to have a healthy recovery. What we have found is when customer satisfaction goes up in the aggregate consumer demand tends to follow. But of course the caveat is that you have to have enough discretionary income or credit available to you to so you can follow up on your intention to purchase. And right now we don't have that. There's also a strong relationship at the individual company level, and it is the strongest when repeat purchase is a strong proportion of the buy and when there's a great deal of competition.

**You note that customer service is seen as a cost center vs. an investment. With the new focus on customer experience, is that thinking starting to change?**

Fornell: Yes and no. I think Amazon is a very good example of that. They do spend quite a lot to improve customer service, but they don't treat that spending as an investment. It's not capitalized as an investment, which in my view it should be in order for the earnings report to be accurate, for the accounting to be accurate. But they don't, and many other companies don't, because it's not what the accountants do. It's treated as a cost. You look at Amazon, and they usually take a hit when their earnings report comes out. But the only reason for that is they're investing more in various aspects of customer service. If the accounting people did it right that wouldn't happen. But this is a company that has yet to deliver great profit.

**In her book "You Call Is (Not That) Important to Us" Emily Yellen quoted you saying that Swedes complain the most. How do other demographics map to customer complaints?**

Fornell: If you take men and women, for example, women actually complain less, and women are also more satisfied. There is an economic explanation for that, I'm not sure it's right, but the economic explanation would be that women tend to spend more time shopping, think more about the process and are better shoppers; therefore they also buy products that are more suited to whatever purpose they use them for and they come out of the whole thing more satisfied and with fewer complaints. We have geographical differences too. On the coasts people complain more. In the mid section of the country it's somewhat less. I'm not sure exactly why that is.

**What about complaining by age?**

Fornell: Older people tend to complain less across the board, but they're also more satisfied. I think it's the same thing, maybe the older people have been around more, they know themselves better, and their purchase behavior is more stable; therefore they come out of the experience better. Maybe they take fewer risks as well.

**What, if anything, can we learn from all that?**

Fornell: The way to get high satisfaction and fewer complaints obviously is to deliver a good product and good service. But the most important factor is actually not that. It's what I would refer to as fit. If the product really fits the needs and wants of the buyer then things usually work out. If it doesn't, well then you have problems to begin with. As a seller, it's very difficult. You tend to exaggerate the benefits of a product. You want to make that sale even if you know this is not really what the customer should have, but you try



to sell it anyway. Then you pay the price later of not only having a dissatisfied customer that will not come back to you, but they spread the news as well. It's better in the long run to be very selective in terms of targeting and maybe even saying no to customers who may want to buy your products if you don't think they're going to be happy with them.

**You say complaining can be a good thing. What do you believe is the best/most effective way, and channel through which, to complain to a company these days?**

Fornell: I think most companies by now are pretty receptive. Also the call center should have enough instructions to deal with the complaining customer in a smart economic way, which is of course not to question the validity of the complaint so much, but to essentially give the complainant what they want for the most part even if the real complaint might be questionable. It's usually the smart, economic thing to do, and I think most companies try to do that even though it is really hard.

**What about complaints on social media? Are companies good at responding?**

Fornell: It depends on the seriousness of the complaint. I think regardless of how the complain comes in, good companies that will stay in business longer address those complaints. I was in a Greenwich, Conn., hotel yesterday and they told me all the rooms were booked and that they'd move me to another hotel. And I said no, all my meetings are here. Once you complain like that and say you're not going to move, then they usually find a room. That happens to me all the time. You don't get the room you want. I got a smoking room, but I didn't have to pay for it. Does that make me a happy customer? Not really. But at least I'm not furious at them.

**What are your suggestions on how to best respond to and leverage social media to increase customer satisfaction and become a stronger organization?**

Fornell: If you expand the airline example we talked about, when they have something to say that's of relevance to the customer experience or to a customer group that's interested in a specific thing, then social media can play a great role. I think we see some of that; it could be better I suppose. But the problem we're facing now is the irrelevance and the sending out a bunch of messages that most of the receivers aren't interested in. You've got to be somewhat selective even though it costs you nothing to send it out. You're an irritant then. But once you have something to say, if you sent something that was worthless to those individuals 10 times, they're not going to listen to the eleventh. You've got to be careful. We now suffer from too much information as opposed to the other way around.

**Let's talk about customer anger. You say it can be a good thing. Explain.**

Fornell: If you have angry customers and you hear from them, you should probably encourage that even though their message may not be easy to listen to. I would advise companies to listen to it and then quickly try to figure out if this is a general problem or a unique problem to that customer.

**Some of my sources say that customer service and CRM are converging to allow businesses to capture and distribute voice-of-the-customer data in real time to workers so they can take immediate steps to improve the customer experience. What are your thoughts on this idea?**

Fornell: In general it is a good idea to have service providers alerted, in real time if possible, about things that need fixing, but there are some caveats here as well. One is that the opinion of a single customer may not be representative and therefore not warrant a change or fix. If it is about a dirty lobby, that would probably be easy enough to check, but if it is something that's not so black-and-white and more dependent on the subjective taste of a customer, it is not so easy. From the customer's perspective, there may also be a privacy issue depending on how the VoC was captured. For example, it is fairly common in the auto industry that the sales rep gets ahold of the filled out questionnaire by the customer he or she just sold a car to. It's also not uncommon that the sales person then contacts that customer via phone to complain about the low marks he or she got. That obviously makes the customer even more dissatisfied. There will always be an issue of feeding VoC data back to those employees (and their managers) who are responsible for the service complained about. It is a delicate problem because it reports negative job performance, and it is not always clear how serious and/or how representative the problem is. From a management perspective, the objectives are to win back disgruntled customer and to prevent the same problems for all customers in the future. The first requires reaching out to the complaining customer; the second requires analysis to determine how widespread and serious the problem is, deciding how to best fix it (if it needs fixing), and actually implementing the fix.

**Virtually everyone I interview likes to talk about how customers today want to interact with companies how they want when they want. Then the conversation turns to the rise of the multichannel contact center. What are your thoughts on the multichannel contact center? Does it exist today? Will it be widespread tomorrow? And will it significantly impact customer satisfaction?**

Fornell: The need for a multichannel contact center is proportional to the buyer's current and projected future use of these channels in the purchase process. All indications are that consumers will use more channels for products that need physical inspection or demonstration before purchase. **M**

# Overcoming Survey Fatigue

## Five Ways to Get Customers to Respond

**C**ustomers love to be listened to, but they hate surveys. This is a common problem that both B2B and B2C businesses face. To grow our businesses we need to satisfy customers. To gauge satisfaction and improve processes and policies, we need to understand what customers want. And we need to know how well we are meeting their expectations.

The Pew Research Center released a study in late 2012 showing that their response rates dropped from 36 percent in 1997 to 9 percent in 2012. Whether you do phone surveys like Pew, or rely on e-mail, online and IVR surveys, the situation is the same. Customers are bombarded with surveys. They respond to very few.

How do you increase the likelihood that you'll get customers to respond? Here are five tips.

### **Design with your audience in mind.**

Very few people have the time or inclination to wade through a long involved survey, particularly if no incentive is involved. Drop the nice to know questions and focus on what is truly important.

Design your survey to be completed in three to five minutes. If you are using IVR surveys, make it easy for participants to remember their options. Consider using a Likert-oriented scale (i.e., 5 is strongly agree and 1 is strongly disagree). For e-mail or online surveys, you'll be showing your customers options so using a descriptive set makes sense (i.e., strongly agree, agree, neither agree or disagree, disagree, strongly disagree). Give customers the ability to skip questions or mark a question, "not applicable," to reduce frustration and provide more accurate results.

### **Coordinate your surveys efforts internally.**

Customers get annoyed if they receive multiple surveys from one company in a short span of time. Work across departments to make sure you have a coordinated approach.

### **Engage your customer before surveying.**

People like to be asked. Invite your customers by name to participate. Tell them why their input is important. Tell them what you are going to do with the survey information. For e-mail surveys, consider sending the survey from a specific individual (e.g., CEO, CMO).

### **Make it easy and painless.**

Tell them, honestly, how long the survey will take. If you ask your customer to look at their most recent cable bill, the time it takes to find that bill counts as part of the survey time in

the customer's mind. Asking them to move from the survey instrument to do anything will decrease the response rate.

Give customers an opportunity to provide free form comments. You've asked them things that you care about. Now give them an opportunity to tell you what they care about. Optimally, you'll use text analytics to analyze e-mail and online survey comments. If you are using IVR surveys, you'll need speech analytics to cost effectively analyze free form input.

People are busy, they may not respond to an e-mail survey immediately. Send a reminder from the person who sent the survey asking for help and again explaining the importance of the survey. Want to go the extra mile? Consider providing contact information and let the customer call or send a personal e-mail. You'll need a process in place to handle this type of input. And, you may exclude these one offs from your formal survey results, but they can add richness to the voice of the customer. Even for customers who don't take advantage of personal responses, offering it shows that you care.

### **Follow-up.**

My pet peeve is lack of follow-up. I can count on the fingers of one hand the number of times I've received a follow-up from a survey I've taken. Be specific about how their contribution is making a difference whenever you can: "Thank you for your input, and here are the initiatives we are undertaking because of customer responses to our survey on xxx." At a much more sophisticated level, it is possible to put systems and processes in place to respond to customers individually based on their feedback. Publicize what you learn and what you're doing to incorporate the voice of the customer in your organization.

Of course, with any survey program, you need to test and tweak your approach. With sufficient thought and follow through you can create "feedback families" who will respond to you on an ongoing basis not only increasing survey responses, but growing their engagement and loyalty. **M**

*Lisa Stockberger is a vice president at Vanguard Communications Corp. ([www.vanguard.net](http://www.vanguard.net)), a consulting firm specializing in customer contact, including contact center processes, operations and technology.*



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from



## ART OF THE CUSTOMER EXPERIENCE

Art Rosenberg

# All Mobile Self-service Apps Need Customer Assistance

I recently attended Interactive Intelligence's annual global conference, Interactions 2013, where a highlight was the company's cloud-based platform offering for mobile customer self-services, Interaction Mobilizer. Interactive Intelligence has recognized that the solution to support mobile customers with smartphones and tablets will not only maximize the use of customized, multi-modal, self-service business applications offered selectively to customers, but also simplify integration of such applications with flexible choices for accessing live assistance.

**The multi-modal, mobile self-service future looks promising, and the comprehensive tools that Interactive Intelligence has developed will be very critical to fulfilling that promise!**

Mobile self-service applications provide major benefits in terms of contact center operational performance. They minimize the need for and expense of live assistance. They provide greater contextual information to agents for more efficient and effective customer experiences, if and when assistance is needed.

What has to happen with mobile self-service applications is that they must update traditional online application designs for mobile device use, as well as facilitate direct access to live assistance to mobile users with their choice of contact mode from within the mobile application. That would eliminate the need to have a customer leave the app to always dial a toll-free number and go to a waiting queue.

Many online apps already offer customers the option to use IM and text chat for customer assistance. They can also send e-mails with questions and problems. What integration with contact center telephony technology brings to the table is that when customers run into an issue with the self-service application, they can immediately speak to a qualified representative or request a callback when such a person is available and get immediate confirmation of that request. No mobile self-service application will ever always be 100 percent adequate to satisfy every customer need, so the option for flexible live assistance

must be always be offered to fill the gaps in the dynamic needs of every mobile consumer.

Visual self-services will effectively, slowly, but surely, displace the limitations of legacy IVR applications by enabling more information to be efficiently delivered to smartphone and tablet screens. That doesn't, however, preclude using the efficiencies and convenience of voice user interfaces for user inputs, as has already been well demonstrated by Apple's Siri, and other virtual assistants. Such options will be particularly necessary when mobile users are walking or driving a car and must be hands-free or eyes-free.

One of the other major benefits of increased consumer communications mobility is that it opens the door to greater accessibility for pro-active, time-sensitive notifications and reminder messages, which, in turn, can be linked contextually to self-service applications or to click-for-assistance options. This not only reduces the need for expensive and unnecessary live customer assistance, but will also simplify flexible customer choice to access such assistance whenever necessary.

At the recent 2013 UC Summit, our survey of invited VARs, SIs, and consultants showed very high interest in supporting mobile UC for customer services for business clients. However, in a quick audience poll after my presentation, only a very small percentage of the attendees were involved in helping customers with current IVR applications. So, the multi-modal, mobile self-service future looks promising, and the comprehensive tools that Interactive Intelligence has developed will be very critical to fulfilling that promise! **M**

*Art Rosenberg is a blogger at The Unified View (<http://unified-view.blogspot.com>) and consultant with UC Strategies ([www.ucstrategies.com](http://www.ucstrategies.com)).*



Getting Smart on Analytics  
in the Contact Center

## Measurement is the First Step in the Process

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## Getting Smart on Analytics in the Contact Center Measurement is the First Step in the Process

The promise of Big Data has many forward-thinking contact center leaders dreaming of the insights it can deliver, but getting from raw data to actionable insight is a multistep journey that begins with deep thinking about the measurements that matter most.

At iQor, we believe that by taking comprehensive measurements, interpreting them in a disciplined and scientific way, and then sharing the resulting analyses with relevant company stakeholders, contact center leaders can put Big Data to work, driving strategic customer initiatives at the highest levels of the organization.

### FIVE KEY STEPS TO MEASUREMENT

#### Step 1: Decide What You Want to Measure – and at What Level

The first step in the path to Big Data leverage is defining what you need to measure and at what granularity. Do your scorecards address only enterprise-level performance, or are you capturing performance metrics at a lower level? For example, if your goal is to increase overall sales, you need to measure aggregate sales volumes and revenue at the enterprise level. You can often get this data in summary form, directly from your financial systems. But to find specific opportunities for sales improvement, you need to ask questions at progressively lower levels – ideally down to the transaction – where the context of every sale carries a rich set of attributes that you may be overlooking at the enterprise, business unit, salesperson, or even product level.

#### Step 2: Cast a Wide Net

Once you've decided upon what you want to measure – from top to bottom – it's time to take stock

of all available data sources. Look across all the information silos in your enterprise. Consider leveraging information from dialers, IVRs, ACDs, workforce management systems, CRM systems, quality audits, CSAT surveys, sales, and HR systems and tap data at the most granular transactional level. Although some sources may involve millions of data records every day, the keys to unlocking emergent value may be in the small silos, such as spreadsheets, where specialists or departmental contributors enter data because no formal application is in place.

#### Step 3: Find the Right Measurement Platform

Finding a measurement and reporting system that easily integrates data across your enterprise, converts that data into business metrics and, most importantly, delivers dynamic views to the business on a timely basis can be a challenge. To truly help change the way you do business this system must be quick to implement and modify, be intuitive and user friendly, have scalability, and not be overly dependent upon IT for maintenance.

#### Step 4: Correlate, Analyze, and Interpret Your Measurements

Once you have data combined from different sources, you'll begin to paint a new picture of your contact centers' performance. Like any great painter who experiments with color combinations, you should combine data sets in new ways. The results will correlate performance at multiple levels and likely highlight how one key metric influences another. Expect to discover that real performance improvements are not governed by a single variable, but through a complex, interdependent set of variables.

#### Step 5: Leverage Results to Educate and Drive Specific Action

Now that you've transformed your data to generate reliable metrics, it's time to switch mindsets from reporting to ROI. Package information in a simple, timely, and credible format. Then, make it accessible to those in your organization – be they contact center agents or C-suite executives – who can create new initiatives and set policies. Move beyond the agent level and score the performance of campaigns or programs across different segments, like day of week or location. By moving up the measurement and analysis hierarchy, your organization can react quickly to improve performance and evolve methodically toward more sophisticated models that predict future performance.

Many contact center leaders already know the value of measuring performance within their organizations. However, the tools and the processes many use to do the job are becoming archaic. A group of specialists with access to a data source and an Excel spreadsheet can gather information and crunch the numbers for one-time views of performance, but that is not an efficient, comprehensive, or scalable way to measure performance.

Decide to evolve from distributed, localized measurements that focus solely on collecting single-source data to platforms that generate systematized measurement across all available data sources. This measurement approach scales and expedites the path from raw data to measurement – and eventually Big Data analytics. To learn how iQor and its QeyMetrics performance management and business intelligence solution can help your organization measure smarter, visit [www.iqor.com](http://www.iqor.com).



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# Newcomers Introduce Personal Video Platforms that Explain, Engage

In the 1988 movie Big, Tom Hanks' man-boy character gets a job at a toy company and comes up with the idea for a choose-your-own-adventure comic book. Now a company called Engager is bringing a similar concept to corporate customers. Meanwhile, an outfit known as idomoo is offering businesses the ability to create large libraries of personalized videos and deliver them to customers based on their CRM profiles and history.

Both solutions are aimed at helping businesses break through the noise of e-mail, phone calls and Internet communications by leveraging video and personalization.

According to Michael Castellano, founder and CEO of Mountain View, Calif.-based Engager, video has been proven to be more effective than text and images in terms of information retention and personal preference. If you present the same information with text as you do with video, he says, studies show that information

retention will be 50 percent more effective with video. Castellano went on to reference a study by Wharton Research Center that found 90 percent of Internet surfers will leave a website within four seconds, but how that goes down to 60 percent if a video is on the homepage. Meanwhile, he says, Forbes has reported that 60 percent of business people said would watch a video before reading text on the same web page.

The numbers get even better when you add interactivity to the video, Castellano indicates. He says the average recipient of an Engager will spend an average of more than 5 minutes (5.1 minutes) involved in the experience.

Engager's choose-your-own-adventure videos start with a 30-second introductory video, after which the viewer is presented with a question and various answers from which to choose. For example, a virtual person on the screen may ask in what industry the viewer works; based on that answer, the Engager system serves up only videos that are relevant to that vertical.

Castellano says the Engager solution is ideal for B2B companies with large inside sales teams selling products or services that require some explaining. Among Engager's customers are Fujitsu, Pure Storage, SugarCRM, and Symantec. In SugarCRM's video



What can I talk to you about next?

How does engager amplify my efforts?

What are different uses for engager?

How does engager work?

How do I get started?

Back





## Call Center Software Online Community

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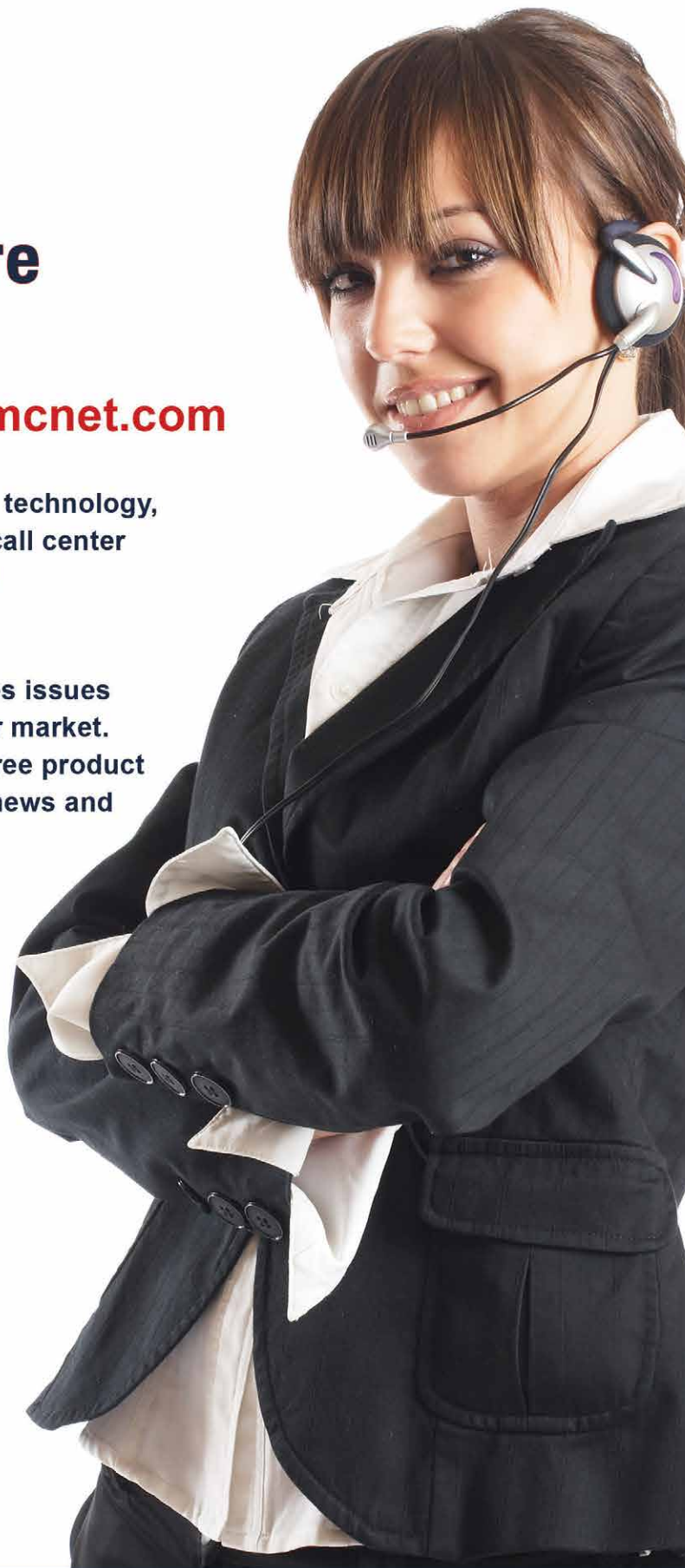
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based on the Engager platform, SugarCRM CEO Larry Augustin talks about his company and then invites co-founder and CTO Clint Oram to discuss CRM. After explaining the benefits of CRM and why SugarCRM is the best solution in this arena, Augustin asks the viewer: What would you like to explore next? At that point, the viewer can select between various options to get a deeper dive; beyond that is yet another tree of video options. The platform also has tie ins with social networking platforms Facebook, LinkedIn and Twitter, so those that receive Engagers can share those videos with others.

Engager, whose small business package starts at \$250 a month, also tracks how people interact with each Engager they receive and ranks viewers based on their level of engagement. That way the sales staff at the business leveraging the Engager platform can access that information from a unique URL and then prioritize their own selling schedules so they go for the low-hanging fruit first. To enable sales people to more easily use Engager, the platform is also integrated with popular CRM solutions from Salesforce, SugarCRM and Zoho.

CRM integration is also an important component of Idomoo's Personalized Video as a Service solution, which the company says is an ideal way to communicate with customers and prospects about bills, insurance options, loyalty programs, and more.

Idomoo's technology is based on industry standard Adobe After Effects and allows any creative studio (including Idomoo's) to make the master video or template,

Name	Engagement	Send	Open	Click	Attach	Action	Share	Interested
Jonathan Greechan	80%			✓				
Alex Dunsdon	60%			✓				
Drew Anderson	60%			✓				✓
Eric Reehl	60%			✓				
Kalpesh Rajvir	60%			✓			✓	
shashank	60%			✓		✓		✓
Aleksey Vorobyov	60%			✓				✓
Dustin Maretz	60%			✓				✓
George Sato	60%			✓				✓
Laurence Nathanson	60%			✓				

which is later personalized. The organization using Idomoo then employs a pre-defined format to create a file containing data exported from its CRM system, and Idomoo then integrates that customer content into any number of personalized videos, which are delivered to customers via their preference of e-mail, mobile phone (via SMS, MMS or mobile application) or to any web destination. Idomoo also provides customers with such data as how many people opened or watched the videos, how long they watched, and how frequently. Idomoo can also do surveys to garner information about how its customers can improve their videos.

Israel's largest insurance group and largest bookstore chain, Harel Insurance Invest-

ments and Financial Services, and Steimatzy, are among Idomoo's customers.

Harel worked with Idomoo for a customer outreach project that involved the creation and presentation of personalized video overviews of the quarterly and yearly statements it sends out to pension fund and life insurance customers. The project had a 40 percent open rate for e-mail; 32 percent overall click through rate; almost no viewing drop-outs during the video; and a yearly 100 percent rise in e-statement signups, according to Idomoo.

Steimatzy, meanwhile, leveraged Idomoo's solution to do outreach for its loyalty club. The bookstore in the past has sent birthday cards to club members, but has now begun sending personalized video birthday greetings. This effort has seen e-mail open rates above 65 percent. And the companies report that within two weeks of receiving the video, 15 percent of recipients completed a transaction in the store.

"Our customer club is all about connecting with customers, creating a relationship that is win-win for the company and the reader," says Carmela Rotman, head of the customer loyalty program at Steimatzy. "Personalized video birthday greetings are an excellent addition to our engagement toolbox because they enable us to deliver a powerful emotional impact that is still cost-effective. The results were nothing like we've seen before, and proved the ability of an online tool to initiate a reaction in the physical world. This is both unique and promising for us."

From: Engager Engager

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Topics

- Introduction
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Larry Augustin, CEO  
**SUGARCRM.**

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Engager Player 00:37



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# The Force of Social Media Management

CRM giant Salesforce.com, which popularized the software-as-a-service concept, in early June announced plans to acquire ExactTarget in a transaction valued at approximately \$2.5 billion. Salesforce.com says that by combining ExactTarget's digital marketing capabilities with its own sales, service and social marketing solutions, it will create "a world-class marketing platform across e-mail, social, mobile and the web."

"The CMO is expected to spend more on technology than the CIO by 2017," Marc Benioff, chairman and CEO of Salesforce.com, said in announcing the deal. "The addition of ExactTarget makes Salesforce the starting place for every company and puts Salesforce.com in the pole position to capture this opportunity."

Here, Benioff explains why there's such widespread interest – both by potential customers, industry startups and peripheral players like Salesforce.com – in what's become known as social media management systems.

Altimeter Group defines SMMS as a "software tool that uses business rules and approved employees and partners to manage multiple social media accounts such as Facebook, Twitter, and YouTube. This system contains features such as governance, workflow, intelligence, and integration capabilities across the enterprise." The consulting group also has written: "Like a disease, social media proliferation will leave companies crippled – unless they develop a strategy to manage now. Some companies have opened a virtual Pandora's box: We found that global corporations are struggling to manage an average of 178 business-related social media accounts – a number likely to grow if unchecked. Beyond coordination challenges, unchecked accounts and disparate customer interactions expose brands

to a host of legal, compliance, and fragmented brand-perception risks... As a result, companies have begun to harness Social Media Management Systems to manage the multitude of customer touch points in social, while leveraging services that range from education, integration, community moderation, and beyond."

Following the announcement of the Salesforce.com-ExactTarget combination, Eric Holmen, CMO at RingRevenue, commented: "The epicenter of technology right now is the marketer's desktop, and Salesforce.com's acquisition of ExactTarget is a smart strategy. The company is surrounding the prospective buyers across more channels, investing in the technology that filters the best leads, and expanding the distribution across these channels – especially in social and now e-mail. This previews how Salesforce and other CRM platforms are likely to approach other emerging channel technologies moving forward."

The ExactTarget deal follows Salesforce.com's 2011 moves to buy expertise in the social channel via its BuddyMedia and Radian6 acquisitions.

Econsultancy recently noted: "With now more than 100,000 customers, the company transformed how companies sell to and service their customers via the Sales and Service Clouds, Salesforce now aims to apply the same vision and mission to revolutionize how businesses market in the social era with the Marketing Cloud. The Salesforce Marketing Cloud is a combination of two companies, Radian6 and Buddy Media. Founded in 2006 Radian6 is the leader in social media monitoring and engagement recognized by both Gartner and Forrester. Through Radian6 the Marketing Cloud and Salesforce established our strategic partnership with Twitter in both Analytics and Engagement. Founded in 2007, Buddy Media is the industry leader in social media marketing. Including over 23 awards it is one of the companies to be included in all four of Facebook's certified partner programs: pages, ads, apps, and insights."

As discussed in the September 2012 issue of CUSTOMER magazine, Marcel LeBrun, senior



vice president and general manager of Salesforce Radian6, last summer blogged that marketing used to involve media campaigns focused on one-way messaging and brand impressions. But social marketing is focused on building customer connections, two-way conversations and customer relationships, he wrote, adding that social media has moved from a specialized team in marketing to the foundation of marketing.

"We believe that marketing is undergoing the biggest transformation in 60 years," he said.


Another company in the SMMS space is Sprinklr. In fact, CEO Ragy Thomas in an April interview told CUSTOMER magazine that Sprinklr is ranked No.1 in this category by eConsultancy Group and is one of the fastest-growing companies in the SMMS space.

The company, established in 2009 and funded by Battery Ventures and Intel Capital, is in use by approximately 250 brands, including such well-known companies as 1-800-FLOWERS, JC Penney, Samsung, Sears, The Children's Place, and Walgreens.

Thomas said that Sprinklr is typically a second- or third-generation solution for its customers, many of which got their start with free listening tools from companies like

HootSuite and TweetDeck. While most products in this category are point solutions that do not scale, Thomas said, the tools offered via Sprinklr's SaaS-based service cut across all job functions and include multiple modules within an architecture that is very scalable and flexible. Sprinklr offers a conversation management module; a collaboration module, which allows different business units to work together; a community management/social CRM module; a social campaign management module; and a social content management module.

PlumSlice, which expects to launch its SaaS offer in October, is another company getting ready to jump into the SMMS fray.

Abnesh Raina, CEO and founder of PlumSlice, talked up his experience working for leading brands including Costco, Restoration Hardware and Williams Sonoma. And he said that listening to customers is not just about social media and delivering service after the product is in the customer's hands, it's about leveraging the information collected to design products that meet customer needs. That said, Raina explained, PlumSlice has built a platform that uses social media, and more – enabling collaboration among product development and supply chain partners. 

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## Automated Technologies and the Human Touch

**I**t's no joke, "Person Drives 100 Miles in Wrong Direction, Following GPS" and Fallout From The AP Hack's 'Priciest Tweet In The World' are both real news headlines, and strong reminders that automated processes still require the human touch.

The AP's Twitter hack, and subsequent stock market dip, is just the latest evidence showcasing how and why next-gen technologies fail when humans are removed from the equation. While many speed traders followed automated processes, and reacted quickly to the false report of an attack on the White House, other firms held back, considering the tweet may not be legitimate.

In one case, a brokerage's managing director took to the company-wide loudspeaker in response to the news, saying, "Careful, those things can be hacked," warning his team to think before acting. Once the tweet was discredited, many traders emphasized the value of their human advantages – noting the person-to-person warning kept their organization from making costly and brand-damaging decisions.

Despite how automated the world becomes, no set of hard and fast rules – developed so far, anyway – can replace a human sensibility and intuition. Responsible companies that depend on accurate decision-making don't blindly trust algorithms to decide the fate of their customers' fortunes.

And that principle shouldn't just go for financial institutions. The same rules should apply for companies that value the fate of their customers' service interactions.

### **Machines May Be Smart, But Common Sense is Essential**

Machine-to-human interactions are becoming more and more commonplace in customer service. Whether it's an interactive voice response tree or a much more comprehensive machine-to-human conversation fueled by natural language processing, companies and consumers alike now



rely heavily on interactive technologies to bring resolution to needs via the channel of their choice.

But there isn't much room for error, and consumers have no patience for machines that are supposed to understand customer inquiries, but simply don't.


Thankfully, technology is rising to meet expectations. Customers are interacting with more intelligent virtual assistants every day – technology that is designed to engage in conversation, understand intent (based on customer input) and take correct action on behalf of users. By definition, these tools are built to understand context, and have the most advanced human-like intelligence behind them available.

Avoiding incidents like the AP hack and stock market dip are top of mind for companies implementing IVA technologies.

### **Infusing Humans into Automated Processes**

In today's fast paced, high-touch world, scalable, 24/7 interactions through automated solutions are essential to providing top notch customer service. The human differentiators within these solutions – developed by both the engineering of the technology and in the process of escalating to live help – is where IVAs bring automated service to life, by functioning as trusted sources of information.





For a company like Next IT, which builds IVAs for organizations like the U.S. Army, United Airlines and Aetna, the human element has always been a part of the success of its overall IVA offering. By adding human inference to process and delivery, the IVAs are able to be taught over time to have the same sort of understanding and experience that makes interacting with people so easy and natural. But there are best practices to follow when checking for this critical human element.

### 1. Does the virtual assistant know the company's customers?

The process of being able to deliver the most intuitive experience for customers starts at the beginning of an IVA implementation process and is continuously monitored over time. Project experts should work alongside a company to discover and analyze common customer needs via existing data and subject matter experts.


### 2. Does the personality reflect the brand?

Some may remember Daimler's failed Dr. Z campaign in 2006, which drew heavy criticism for featuring a character to which consumers couldn't relate, or understand. Personality is a huge part of a virtual assistant's success – and a major opportunity to encapsulate, and bring life, to the

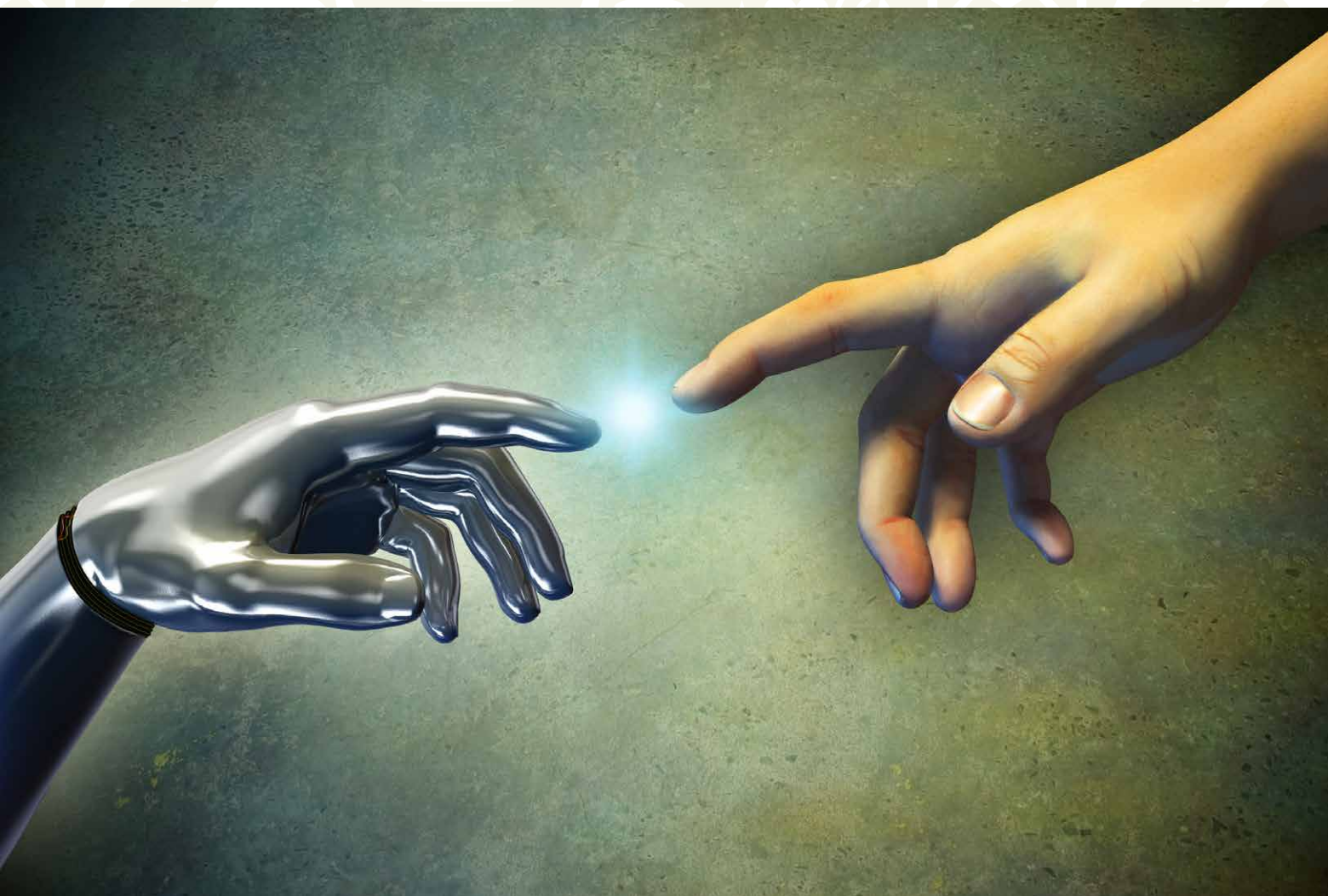
brand. Personality should complement the functionality of the IVA and should include responses to the most commonly asked courtesy-related questions to maximize the stickiness of the assistant.

### 3. Does the virtual assistant know when to escalate to live help?

Based on business-established rules, some inquiries are decidedly best suited to be handed off to a live representative. Virtual assistants have to know when to pass the torch. Triggers for escalation must be appropriately timed, and be seamless.

Customer service and experience technologies need humans in the loop – through engineering, escalation and ongoing improvements – knowing when to ask for help. When corporations implement technologies that leave human intelligence out of the process, it's easy for a wrong decision or inaccurate answer to slip through the cracks. And while the price for those may not always be \$136.5 billion, that underlying risk will always be there. Best practices and past experience tells us that the best way to avoid costly mistakes from happening is to keep sight of the crucial human element. 

*Mitch Lawrence is vice president of sales and marketing at Next IT ([www.nextit.com](http://www.nextit.com)).*



# Multi-channel Analytics Stitching it All Together

**R**ecent news that Watson, IBM's question-answering supercomputer, has now entered the customer engagement arena might come as a surprise to some. For others, including industry insiders, the Jeopardy-winning robot is a timely solution to an ongoing problem, the overall lackluster state of automated customer service.

Each year, according to IBM's GM of Watson Solutions Manoj Saxena, U.S. organizations spend roughly \$112 billion on call center labor and software, yet half of the 270 billion customer service calls go unresolved. Let's face it, reaching a live person is rare. That person on the other end actually knowing what they're talking about is even more unlikely.

IBM is banking on Watson's ability to "quickly address customers' questions, offer advice to guide their purchase decisions, and troubleshoot their problems." But even with Watson's ability to process large amounts of data and information in natural language – and fast – something is missing.

At this year's Annual Call Center Exhibition conference in Seattle, a global gathering for the contact center community, one of the emerging themes was the importance of becoming a customer company. While there was no shortage of new call center applications on display and new vendors entering the space, the question many left asking was: Are we customer centric enough?

Watson is but one example of new technology forces that are continuing to fundamentally impact the market's landscape. And while these advancements are ultimately a good thing, it's imperative that we not become so technology-centric that we lose site of the individuals who are using these tools as a means to reach out to and engage with us.

A 2013 study from the Economist Intelligence Unit called Voice of the customer: Whose job is


it, anyway? claims that over the next three years, global organizations will make understanding and interacting with their customers their No. 1 priority. Of those surveyed, only 56 percent believe their companies clearly understand their customers, and just six in 10 viewed their companies as customer-centric. Just over half reported a clear understanding of customers' tastes and needs.

Given today's access to big data and such sophisticated customer analytics, these are alarming numbers. Since most companies are built around products or geographies, many find it challenging to restructure their businesses around the customer. This is especially true in the world of contact centers where nearly every interaction between a customer and the contact center touches multiple systems across the enterprise.

A 2011 study by Ventana showed that "34 percent of enterprises must get data from six or more systems to produce their analytics. For half, collecting the data is a challenge, and for nearly that many the data used in preparing metrics is only somewhat accurate."

Even if the data is accurate, so much of what we actually know about our customer is siloed. This makes it virtually impossible for companies to get a holistic view of their customers. What we need is to put this data into context.

Stitching all of this information together is no easy feat. To deliver a truly personalized and differentiated service, we have to connect these data dots and analyze who is in front of us. Today's business software does not capture the true richness and complexity of customers. It captures data – not context.

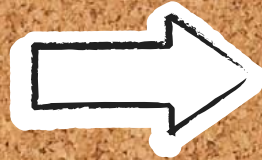
We can all do a better job of knowing our customers through analyzing the information we already have in front of us. This means not only stitching together the multiple interactions of a single customer engagement from multiple systems and channels, but also trying to better understand the overall customer journey through a more human, less Watson-like lens. 

*Arnab Mishra is vice president of products and solutions at Transera ([www.transerainc.com](http://www.transerainc.com)).*



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WE GET THE CLOUD

# Customer Service is the New Marketing; Marketing is the New Customer Service

It's quite commonplace to hear how the advent of social media has altered our lives. Upon first glance, such changes do not appear drastic or far-reaching; however, a closer look reveals something different. Social has paved the way for a new generation of customer advocacy and has brought with it a sweeping disruption of business as usual tactics typically employed by traditional customer service and marketing departments. Today, these once siloed divisions have found common ground and come together to jointly serve the needs of customers in an effort to not only increase the bottom line, but to maintain relevance in the market place.

It is no secret brands are built on superior customer service. To achieve maximum customer satisfaction, organizations must truly understand the concept of the customer journey and maintain consistent conversations across all communication channels and touch points. Today's customers demand service to be agile. They think nothing of starting a conversation in one channel and concluding it in another. With an understanding of the power individual recommendations hold across digital networks, anything but a complete investment in meeting these demands would be remiss. While customer service handles monitoring and response, marketing must ensure brand continuity across each point of interaction. Within small and large organizations alike, meeting these needs requires sound planning and flawless execution.

Deeper examination reveals a latent, long-term benefit of the convergence as well: the achievement of cross-organizational goals and

the assurance of each department's vitality. Marketing without question benefits from the knowledge and insight provided by customer service. By examining existing contact centers and bucketing the feedback regularly received regarding products and services, crucial information can be gleaned and considered throughout the development of major initiatives and campaigns. In tandem, customer service may act as an additional arm of marketing by interacting in real time with customers, sharing key messages and more.

The need to manage this process and monitor customer behavior has even earned a place within the highest levels of organization. The chief customer officer represents the customer voice in the executive boardroom and is charged with conveying consumer communication preferences and providing insight into the channels they are using. The message is simple – if you don't start managing from the customer's perspective, your hard-won customer may become a defector. Customers are inundated by hundreds of choices, offers and prices on a regular basis. To win the land grab, businesses need to captivate consumers and continuously improve the experience. Customer retention is a business imperative and this active voice at the executive table is now a necessity. It's truly a sign of the times.

Ushering the convergence of marketing and customer service isn't necessarily an easy task. However, breaking down the walls between these once segregated divisions only helps better serve the customer and ensure the delivery of a superior and memorable experience. Organizations that deliver can expect returns that include fierce customer loyalty, revenue growth and overall brand health. Staying focused on the journey, instead of the destination, is key and organizations that recognize this and plan accordingly will undoubtedly fare better than the competition. **M**

*Marchai Bruchey is chief customer officer at Thunderhead.com.*





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# NEWS



## SAP Ventures Invests in Five9

Five9 has raised \$34.5 million in private funding from SAP Ventures, an independent venture capital. SAP was joined by existing investors Adam Street Partners, Hummer Windbold Venture Partners, and Partech International. The \$34.5 million in funding is comprised of \$22 million in series D equity and \$12.5 million in a bank revolver debt facility provided by City National Bank. Jai Das, managing director at SAP Ventures commented: "Five9 is transforming the contact center of the future. The company is driven by a passion to turn contact centers into customer engagement centers of excellence, plus they have unparalleled experience in using the cloud delivery model in contact centers. We are excited to partner with a clear market leader that is disrupting this very large market."

## Genesys to Acquire SoundBite

Customer engagement and contact center solution provider Genesys has announced its intention to buy SoundBite Communications for \$5 per share. SoundBite delivers cloud-based collections, payments, and mobile marketing applications, as well as proactive customer service solutions to enterprises. Genesys says the deal, which is expected to close early in the third quarter, will strengthen its cloud solutions portfolio, building on its recent acquisition of Angel for self-service and contact center solutions. The acquisition is expected to contribute approximately \$50 million in cloud-based revenue to Genesys, bringing the total to more than \$135 million for the company's cloud business, and add approximately 450 new end customers to its existing base of 800 cloud customers.

## Mr. Watson, Are You Ready?

IBM's famed Jeopardy champion, Watson, has been repurposed for the call center. Big Blue in May revealed the IBM Watson Engagement Advisor, a cognitive computing technology designed to improve the customer service experience in the call center. Watson has the ability to not only understand the definitions of spoken words, but is able to discern colloquialism, puns, rhymes, double meanings, sentence structure, and can infer hints from context. Moreover, it is able to rapidly process tremendous amounts of information to make nuanced logical connections between ideas and sentences and thereby respond appropriately to nearly any inquiry. According to IBM, 50 percent of the 270 billion annual customer service go unresolved, 61 percent of which could have been resolved with better access to information. "The IBM Watson Engagement Advisor will help companies make their interactions count by knowing, delivering and learning what each customer wants – in the context of their preferences and actions – sometimes before even the customer knows it themselves," IBM said in a statement.

## ContactBabel Talks Chat

New research published by analyst firm ContactBabel reveals that web chat (or instant messaging) is one of the fastest-growing technologies used by U.S. contact centers. Forty-three percent of this year's survey respondents offer web chat as a customer service channel, compared to only 15 percent five years ago, with volumes of web chat increasing by 125 percent over the same timescale. "While web chat has been around for many years, we are seeing a definite increase in the use of this channel, which has huge potential," according to ContactBabel. "The real-time nature of web chat means it is akin to a voice conversation in immediacy, giving it an advantage over e-mail. Multiple concurrent web chat sessions can be run, cutting cost per interaction, which means there are sound commercial reasons for businesses to support this channel."

## Advertising for All!

A free social media advertising tool called AdTangerine aims to make online advertising available to everyone, something the company says until now has been considered an expensive and impossible undertaking for most small businesses and start-ups. The website allows users to advertise anything from their business to their Facebook page using the abstract currency of Tangerines. Advertisers offer users a certain number of Tangerines to publish their advertisement on their personal Facebook or Twitter profile. When users have earned enough Tangerines, they can withdraw the funds in the equivalent cash amount via Paypal or use the Tangerines to get their own advertisements published by other users.

## Forrester Tracks the 'Renegade Tech Buyer'

Fewer than 10 percent of business decision-makers outside of IT are not spending their own budget on technology services, and of the 90 percent who are, almost a quarter of earmark 21 percent or more of their unit's expenditures for IT, according to new research from Forrester. This group, which Forrester calls "high spenders," has good relationships with IT and views the CIO and his/her office more positively than lower-spending business leaders. "CIOs have to pivot and act more as a consultant to the business — the days of a centralized controlled IT world are over, just like the centralized state-run economy of the Soviet Union is a thing of the past," blogs John McCarthy, the author of the report.



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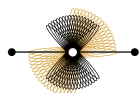
With the introduction of social media, the requirements associated with providing quality customer service have changed dramatically. No longer are you engaged in a one-to-one conversation, and no longer is it acceptable to simply provide the basics. Instead, the role of the contact center has changed overnight to one who's performance is socially viewable by others, and one that requires you to provide a superior customer experience - every time.

It's not about simply answering your customer's questions. Instead, in order to be successful, you need to build a relationship - during each interaction, across each channel. More than simply having a presence on Facebook, Twitter, and LinkedIn, this relationship-structured, often one-to-many interaction method, is how customer service is evolving and is the essence of social customer service.

During this webinar, we'll help you get out in front of this shift in service methods. We'll share with you the best practices for turning your contact center into a social customer service center that builds relationships with your customers through all channels that they wish to communicate with you - voice, email, chat, text, video and social.

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## Chicago Theater Fills Seats by Using Rich Media Messaging

**T**he Chicago Shakespeare Theater is a non-profit organization located in the heart of Navy Pier close to downtown Chicago. The professional theater company is known worldwide for its critically appraised Shakespeare productions that are performed 48 weeks of the year in more than six hundred annual performances.

This past fall, the theater needed help promoting its new Shakespeare musical, "Sunday in The Park with George". The theater was faced with a major challenge due to the double-digit decrease in audience caused by the struggling state of the economy. It had less than \$10,000 budgeted to promote the musical and fill empty seats.

Chicago Shakespeare Theater and Leo Burnett USA worked together to kick off the fall production beginning with a surprise live performance by actors from the musical at the Art Institute of Chicago. What was surprising about the performance? The actors performed "Sunday", a signature song from the musical, in front of a life-sized replica of the famous masterpiece, "Sunday Afternoon on the Island of La Grande Jatte" by George Seurat, but this replica had key iconic figures removed mysteriously from the original work of art, such as the pipe-smoking fisherman and the parasol-toting Madame. The goal of the performance was to show how characters from the famous masterpiece have left the painting to be a part of the upcoming production and to convince art lovers at the museum to find the missing characters by attending the musical.

After the surprise performance, the audience was encouraged to join a mobile messaging campaign to discover more about the secret of the missing characters. By texting SUNDAY to short code 40679, art lovers and theater enthusiasts across Chicago were able to opt in and receive more information about the musical. The performance at the Art Institute of Chicago was captured on video and integrated into a marketing campaign using mobile, social media, PR campaign, and the auctioning of the faux painting for charity, which all culminated into multiple campaign impressions with the audience to remind them of the production.


Using Iris Mobile's image-based mobile messaging technology, Rich Media Messaging, opted-in audience members received a video explaining how the missing characters in the painting have come to life in Chicago Shakespeare Theater's new musical and encouraged them to buy tickets to see the performance. Opted-in audience members were also entered in a contest for a chance to win free tickets to a Chicago Shakespeare Theater production, Chicago cultural weekend, or tickets to Paris to experience a

Sunday on La Grande Jatte in person. The use of Rich Media Messaging enabled users to receive exclusive rich video content, which they could easily share on Twitter and Facebook, further amplifying the success of this campaign by reaching out to new customers on personal social networks. The RMM platform automatically detected and optimized messaging content individually for all different mobile devices so opted-in individuals were able to view content clearly on their screens, resulting in very high engagement, and all at standard messaging rates.

Results show that 21.7 percent of the customers who participated in the campaign had feature phones while 78.3 percent had smartphones. Over 14 percent of opted-in users shared the rich content they received on their Facebook. Additionally, over 17 percent of opted-in users agreed to receive future updates from Chicago Shakespeare Theater over messaging. This creative use of technology resulted in a unique interactive mystery for the audience and helped Chicago Shakespeare Theater deliver tremendous results using mobile messaging.

According to Sean Brennan, marketing assistant at the Chicago Shakespeare Theater, "Not only did Iris Mobile's marketing solution help generate positive buzz for our production, but it also provided an innovative way for us to engage with theater enthusiasts in Chicago."

This multi-faceted campaign produced excitement for the upcoming production by generating more than 8 million impressions in just 24 hours; breaking records with the highest number of first-time guests in the history of the theater; and extending the musical for an extra week due to popular demand for tickets.

Leo Burnett and Iris Mobile received high recognition at the Brand Activation Association's 2013 REGGIE Awards by winning the Super REGGIE Award, which distinguished the campaign as best-in-class compared to all other gold winners that night. They also won top awards in the Creativity & Innovation, Experiential Marketing, Local/Regional Campaigns and Small Budget categories. 

*Cezar Kolodziej is the president, CEO and co-founder of Iris Mobile ([www.irismobile.com](http://www.irismobile.com)).*



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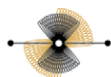


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## Leveraging Forums for Customer Service

**B**efore there was Twitter and Facebook, Internet bulletin boards and newsgroups were the places people exchanged news, ideas, and debate topics. They're still around and growing, with millions in existence and growing daily – they just have a different name. Today, we call them Internet forums, and they are booming discussion groups that provide a place for people who are passionate about a topic to interact, and companies who want to market products or engage with their customers to commune. Online forum users participate and monitor the forums they belong to on a daily, if not hourly basis, and they are active to the tune of hundreds of millions of unique monthly visitors and page views every month.

For businesses that want to engage customers in a more intimate, two-way communication than today's social media, creating a forum can be an effective vehicle for learning about their needs, including ways to best serve them – a strategy that can deliver increased customer loyalty.

### Give Your Customers a Voice

We all know that companies live and die by their customers, so why not actively engage with them? Forums provide the means to secure immediate customer feedback, helping to ensure your company's long-term success.

Adding a forum to your website gives your customers a voice in your organization and makes them an integral part of your online presence. It also fosters the creation of your own unique online community. Your customers are ready and willing to engage with you online, and the information they provide can be invaluable.

By reaching out to your customers on a forum for their input, opinions, and feedback, you gain access to worth-

while business intelligence that can improve your internal decision-making process. People are more than willing to provide their opinions; you just need to provide the platform to make that engagement happen. The instant feedback that you receive through your online forum can provide you with invaluable information that can help you quickly adapt your products and services to meet their needs.

### Turn Your Customers into Advocates

One of the biggest advantages of providing customers with access to a dedicated forum is the collaborative engagement that follows. Over time, your active forum members will learn more about your business through their interactions and become some of your most staunch and vocal advocates. As a result, these frequent visitors can be extremely helpful with assisting and influencing your other customers, as they have already acquired a great deal of knowledge about your products or services.

When a new member comes to your forum looking for advice or needing



an answer to a question, many times other forum members will be ready and willing to answer. In this way, your forum enables you to provide customer support 24/7 – even when your offices are closed. This means a better customer service experience for your visitors, without the need for committing further company resources.

To support this effort, you'll need to provide positive reinforcement to members that can have an impact on your forum community. Publicly recognizing their contributions will not only help build loyalty towards your brand, but will also allow them to know their efforts are appreciated. This encourages other members of your forum to follow suit and enriches the overall dialogue of your community.

### Increase Customer Loyalty

Those who regularly read and participate in online forums are dedicated helpers and communicators that offer companies a ready-made audience for customer

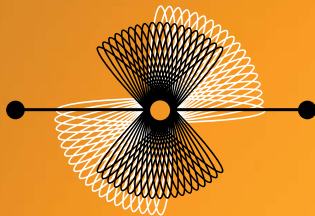


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service, marketing programs, product feedback and consistent engagement. Using a forum helps foster a sense of community, and leads to repeat visitors and stronger customer loyalty.

Your customers all have a common interest: your product or service. By empowering your customers to express their thoughts online, you break down existing communication barriers and encourage members to have a vested interest in your company through their continued engagement. Further, publicly engaging with your customers shows your clients that you are listening to their concerns and are dedicated to meeting their needs.

Allowing people to help each other by having an open customer support forum allows your customers to be your advocates. Letting users help each other and champion your product increases user happiness and helps customer retention rates.

## Building Your Online Presence

Forums help boost your online presence and image. By actively engaging on a forum, your strong online presence shows a dedication to your customer base. This increases the confidence of your customers knowing that they can reliably get support for your product or service.

While most companies have a Facebook page or a Twitter account, social media is not the last word in customer engagement. Sites like Facebook and Twitter allow you to get a message out, but they don't encourage two-way communication. You want your customers to feel like you're listening to them, not dictating to them. By providing a more intimate, interactive conversation, your organization will score you more

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### Tech Support

Board	Threads	Posts	Last Post
<b>Help Guide</b> - 3 Viewing Check here first to view our extensive help guide that covers many common issues. Sub-boards: Users and Members, Admins and Moderators, Developers	127	405	<a href="#">Changing the Forum Width</a> by <a href="#">ProBoards Help Guide</a> 2 hours ago
<b>Support Board</b> - 17 Viewing Have a question? This is the place to get your answer. Support is provided here by our staff 7 days a week (except national holidays). You may also receive support here from other helpful ProBoards members.	107,834	713,757	<a href="#">Sorting thread by subject, etc.</a> by <a href="#">Brian Ordonez</a> 1 minute ago
<b>Mobile App Support</b> - 1 Viewing For support topics relating to both the Android and iOS versions of the ProBoards Mobile application.	712	5,049	<a href="#">Brackets</a> by <a href="#">Ricky Zylvoski</a> about an hour ago

### Coding & Development

Board	Threads	Posts	Last Post
<b>Plugins</b> - 4 Viewing Talk to ProBoards members about the v5 plugins system, request plugins, and view the Plugin Library. Sub-boards: Plugin Library, Request a Plugin	938	13,815	<a href="#">Image Security</a> by <a href="#">Todge</a> 7 minutes ago
<b>Themes</b> - 1 Viewing Talk about ProBoards themes, request a theme, or browse our Theme Library. Sub-boards: Theme Library, Request a Theme	90	945	<a href="#">Tropical!</a> by <a href="#">Eli</a> 2 hours ago
<b>Templates</b> - 3 Viewing Sometimes a plugin isn't the way to go. This board is for requests and discussion of template mods. Sub-boards: Template Library, Request a Template	432	3,753	<a href="#">Calender Stuff</a> by <a href="#">tunescool</a> 8 minutes ago
<b>Headers &amp; Footers</b> Come here to discuss and find codes that you can use to customize your forum using Headers & Footers. Sub-boards: Headers & Footers Library, Request a Header & Footer Code	113	1,020	<a href="#">Change Font Used In Quoted Text</a> by <a href="#">pawelqun.i</a> 17 minutes ago
<b>Graphic Design</b> - 2 Viewing Come here to talk about graphic design or request a graphic. Sub-board: Graphic Design Requests	22,582	118,435	<a href="#">Splash page request</a> by <a href="#">wolfforge</a> 52 minutes ago
<b>Development Blog</b> Come hear about the exciting improvements that the development team has added to ProBoards, and offer your feedback.	2	5	<a href="#">More Color Schemes in the Colors &amp; Theme Creator</a> by <a href="#">Tim Camara</a> 3 hours ago

### Your Forum

Board	Threads	Posts	Last Post
<b>Get Opinions About Your Forum</b> - 4 Viewing Post a link to your forum here so that other members can review it, giving you their opinions and suggestions on ways to improve. Also, you can give your opinion on other people's forums.	26,667	222,986	<a href="#">Reaper Role-Play</a> by <a href="#">chikok</a> about an hour ago
<b>Advertise Your Forum</b> - 6 Viewing A place for members to advertise their board. Revised format; read the sticky threads for further info. Sub-boards: Theme of the Month, Art/Music/Tech, Graphics/Coding, ProBoards Related, General Forums, Roleplay Forums, Fan Forums, Archives	48,157	1,075,431	<a href="#">ONE LAST BELL - real life college/city</a> by <a href="#">kimlauren</a> 2 minutes ago
<b>Discussion: Your ProBoard</b> - 2 Viewing A moderator will post one topic a week to be discussed. All discussions are about your ProBoards, ranging from design to getting members to your forum. Sub-board: Archived Threads	348	8,076	<a href="#">What makes a forum die?</a> by <a href="#">Weishling</a> May 10, 2013 at 5:42am

### General

Board	Threads	Posts	Last Post
<b>General Talk</b> - 14 Viewing Chat with other ProBoards members Sub-boards: The Game Board, Welcome	101,838	2,118,565	<a href="#">How to (politely) Tell Your Roommate They Need to Move Out</a> by <a href="#">kristabelle89</a> 30 minutes ago

### Legend

New Posts
 No New Posts

### Forum Information & Statistics

<b>Threads and Posts</b> Total Threads: 413,280    Total Posts: 4,896,173 Last Updated: Sorting thread by subject, etc. by <a href="#">Brian Ordonez</a> (2 minutes ago) <a href="#">Recent Threads</a> - <a href="#">Recent Posts</a> - <a href="#">RSS Feed</a> - <a href="#">Mark All Boards Read</a>	<b>Members</b> Total Members: 188,130 Newest Member: <a href="#">thunter44</a> Most Users Online: 89,715 (Jan 14, 2013 at 8:56pm) <a href="#">View today's birthdays</a>
<b>Users Online</b> 6 Staff, 36 Members, 74 Guests. Member, skidjit, channonite, kimlauren, chikoot, CharleeRAWR, aquarius1427, Chaotico, The Bane, twdfan, altctrldit, SuperChick, moonbeam, Zuka, smokegrey, blueshead, Speed33, caissa, Mands, flarezone, tunescool, MidnightSoul, Soren, Berry, zurth, dno, Lori, Salmo, Kin, Sam, dannywarbucks, *:Steph0ny*: Stars Fall Tool, ebonydoe, forte, Rita, woop, Martyn Dale, Brian Ordonez, Ricky Zylvoski, Keith Rozett, Patrick Clinger	
<b>Users Online in the Last 24 Hours</b> 18 Staff, 402 Members, 2,683 Guests. madame hook, AlmightyQuinn, joshw2011, *Shadow, Kcx, thunter44, Aether, Shrike, Chrissie, carousel, kristabelle89, paulann, xstveuvek, martinel, plastictrucker, imagination, Inter(n)ational, Jules, Willing Sniper, Akadeanna Hawk, shortyverrett94, Omio, Xlkeon, stveurecobi, caeterie, emily, The Maniac On Wheels (The MOW), ZAR, Lou Vendetti, Izzy, A R T E M I S, ZeroKittch, K'DIZZLE, - Tallis, Joilet, Nymph, wolfforge, Pinkie_Pie, mudavenom, buri288, cannyfradock, mattius157, PRESLEY, RPlover, Graham, Spiritfoxy, Gia_Sesshoumaru, Destri, adwoman, DCSWinchester, Demian Kinley, Reg89Reggie, AMBER <3's Cia, pixiekitti, ALIX I, Rath, Oneeb Malik, Lane Rendell, Shava, waster1966, wildgoosespeeder, pvancl27, iamthemostwanted, Silver, Smangil, Mercy, Katherine Pierce, sRMYS3, rebekahlee2, JenF, ReaperRAdmin, joganmax, Weishling, Vita, bic, christine1966, Stinky666, alexx, Nevada Mikado, Sruishy, fleckphantasma, Dionon, greey, emberdawn, toki, riccetts, BFD, Rosefiend, Dan, Athene*, Seppy, McGani, Mark, Mistuh M, James D, Tinkerbell, Trinity Blair, With an M, xxspade, Captain Court, and 278 more...	

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points with your customers than simply blasting out generic messages to your entire customer base through social media channels.

Forums can help you disseminate your company's message quickly and cost effectively. By posting news and announcements to your forum, you reach your core audience quickly and get timely and honest feedback in return.

Further, forums are full of keyword rich discussions that can help your site's SEO. Since forums are all about initiating and continuing discussions, you will have a never-ending supply of new content being created on your site. With search engines prioritizing fresh content, forums frequently appear as the top results for many search engine queries.

When customers use search engines to find information about your product or service, you can expect that results from your forum will quickly provide relevant answers.

Another added benefit of online forums is how they police themselves. Participants gain credibility and lose it based on their contributions to the forum. Legitimate criticisms improve a company's operations, while personal gripes are refuted by informed customers. Smart business managers can take the feedback on the forum and make changes that directly impact a customer's loyalty, perception of the organization and the bottom line. **M**

*Patrick Clinger is founder and CEO of ProBoards (www.proboards.com), a host of free forums on the Internet.*



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## How The Online Sales Tax Will Benefit E-Tailers

Competition is the essence of commerce. The only way businesses get stronger and customers benefit over the long haul is if there is competition to do things better, faster, or at lower cost. All that businesses can or should ask for is that the rules of competition are fair to all parties.

The current debate over collection of sales taxes for online purchases is a perfect example of fairness in competition. Current U.S. laws dictate that sales taxes are only collected in states where an online business has a physical presence. The proposed Marketplace Fairness Act legislation would require collection of sales tax for all Internet purchases – a scenario many e-tailers feel would be ruinous to their profitability.

I work for the daily deal website 1SaleADay.com. Imposing sales tax for online purchases will help not only our business model but also, over the long haul, that of all e-tailers. And here's why.

If a Tomtom GPS sells for \$100 at Walmart, it would probably be listed for \$80-90 on Amazon. When you factor in mandatory sales tax, an Amazon customer will be paying an average of 8.629 percent sales tax, making the cost dangerously close to Walmart.

Yet discount daily deal websites like ours would sell the same GPS for \$39, which would make the deal more attractive even if the consumer pays that extra 8.629 percent. Conventional online prices will be comparable to brick-and-mortar prices – but the pricing advantages of discounted deals will still be significantly more competitive than brick-and-mortar.

Price points separate daily deal sites like 1SaleADay, Fab and Woot from Amazon and eBay. Before we list a product on our site, we comparison shop it with online retailers to ensure our deals are significantly less than what consumers can find elsewhere online.

It may be worthwhile for a consumer to buy at Walmart instead of Newegg because Walmart's prices will be competitive, but daily deal prices will still consistently beat



bricks-and-mortar ones. Comparison shoppers will be compelled to find the better deals online. Those deals are the daily deals.

How are daily deal sites able to offer better prices than both bricks-and-mortar and conventional online retailers? Selling fewer products in greater volume is the key. The more quantity one buys, the better deals the customer gets and, in turn, the cheaper e-tailers can resell.

Other kinds of e-tailers find different formulas. Newegg, for example, sells thousands of different product SKUs, which does not allow for high volume purchasing. Although it drives more overall sales when compared to daily deal websites, it sells less of individual products, which is why their price points don't match the daily deal model. And yet the company satisfies customer needs.

The point is, the burden of implementing tax-calculating software will be initially painstaking and costly for online companies. But in the long run, e-tailers of all stripes will, by the nature of business, find new ways to compete. Daily deal sites like ours have a formula that allows us to effectively compete with the megasites like Amazon, eBay and others. If we can take on these well-known names and win, surely all e-tailers can find ways to remain competitive – even in an era when sales tax collection becomes mandatory. **M**

*Eliyahu Federman is senior vice president and CCO of 1SaleADay.com.*





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# Mobility in Contact Center Management

## Freedom, Functionality and Even a Touch of Fun

**W**hen we think of mobility in telecommunications, most often our focus goes immediately to mobility in unified communications and the ongoing challenge of presence management. This includes road warriors, for example, relying on find me/follow me applications, sales executives seamlessly accessing office-based functions out in the field, and smartphones and other personal devices being integrated into the corporate phone system to work as external extensions.

These capabilities are quite well known and have grown to maturity in the communications industry. But there is another area of business communications that is not traditionally associated with mobility, but where the power and freedom of this technology can make a significant and tangible difference. This area is the modern contact center, in particular, its supervision and administration.

### The Wall Bored

Normally, when you think of contact center supervision and administration, visions of giant wallboards spring to mind. It is a mainstay progress indicator of the traditional contact center environment that still prevails today – a singularly uninteresting format. Most contact center managers would agree that this fixed technology is dated. In fact, wallboards have always been thought of as clunky and unwieldy, expensive to deploy, tough to integrate with contact center software, limited in the amount of critical information they can display, and useless if they don't happen to lie directly in your line of sight. Even at an angle, or viewed from a distance, wallboards are difficult to see. But the main drawback of wallboards is that they tend to keep supervisors locked to fixed positions in their offices, limiting their ability to move freely about the contact center and interact with their agents, let alone travel throughout the company to tend to other business.

Today, however, especially with the proliferation of social media and the demand it creates to resolve caller issues on the spot, contact center supervisors and administrators can ill afford to remain tucked away in their offices, with bleary eyes locked onto desktop monitors or the main room's giant wallboard. Supervisors need to be able to get out and about to stand side-by-side

with their agents and interact with them person-to-person, but they must be able to do so without losing touch of the contact center's minute-to-minute status. Short of lugging a Wi-Fi laptop around – or strapping the wallboard to an oversized hand truck – the mobility choices for the supervisor have remained, until now, basically limited. But mobility has finally come to the contact center supervisor and with it, liberation.

### Tablets that Get You Out of the Office

Imagine supervisors being able to access and manage their contact center software's progress and administration screens using convenient portable tablets that offer a simplified and more intuitive graphical interface — a progress dashboard, if you will, that leverages the slide-and-tap touch screen navigation that has become so ingrained in our everyday lives. And because these interfaces are so inherently familiar to the user, thanks to the estimated 100 million-plus tablets in use today, very little special training, if any, is necessary.

Supervisors and administrators can carry these tablets literally anywhere in the company and remain in touch, not only with contact center stats and status, but also with their agents via live chat capabilities. These tablets can be carried into conference rooms where daily progress meetings are held, and the information can be wirelessly projected onto video screens for all in attendance to see. No need to rush back to the office for data, no need for stacks of paper, no need for spreadsheets, and no need for reports that are outdated the minute they are printed. For contact center supervisors who are plucked out of action to attend frequent status meetings like these, the value of such mobility becomes immediately and thankfully apparent.

### Greater Convenience and FUNCTIONality

Another important value proposition for conducting contact center management supervision via handheld mobile devices is that tablets can be fun. Yes, fun. And anything that infuses the sometimes monotonous and mundane world of contact center management with new energy is a good thing, not only ensuring technology adoption among stubborn, cranky, and set-in-their-way users, but also encouraging them to adapt to newer, more modern, and more productive work techniques that promote greater utilization of software.

There's a reason why tablets have become so popular so quickly and so prevalently: They are curious and interesting to operate. They are immediate, personal, and convenient. And to a great degree, they are fun to use. That said, don't let these appar-



ently whimsical descriptions of tablet use fool you. They represent phenomenal technology and immeasurable potential in work settings. Their easy mobility and proven appeal possess the power to make a profound impact on the management of your contact center. They'll make for better morale among supervisors, who can now be liberated from the lonely seclusion of their offices without feeling

they are losing touch with the information they need to be effective managers.

### What You Need

About now, many of you may be asking yourselves: Sounds great; but does it really make sense to pursue this investment, when, technically, I don't really need this technology? Fair question. And here is a rebuttal worth

considering: The introduction of the tablet has caused a sea change in technological culture around the world, and since an increasing number of commercial and industrial environments are routinely introducing tablets and other portable devices into their day-to-day operations, a compelling argument can be made that the time to innovate the contact center with tablet-based mobile administration is now.

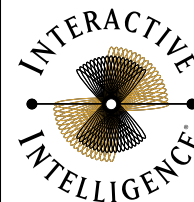
Contact center supervisors would be able to more freely rove and roam throughout their departments in more fluid and organic ways, interacting more personally with personnel, and humanizing the overall experience for agents as well as customers. In addition, from an integration standpoint, a new, graphically rich, tablet-based front-end experience can be easily and seamlessly integrated with existing back-end systems, making the move to mobility not only feasible, but also simple and non-disruptive. And, if all this weren't enough, the price of tablets keeps dropping, so implementation and deployment of mobility in the contact center continues to become a more affordable proposition each year.

### Making the Move to Mobility

Tablet culture is here to stay, and it's where humankind is inevitably headed. As technology developers continue to create for today's two to three top platforms, and optimize applications to accommodate for varying screen sizes, the tablet will continue growing, as projected, as one of the multimedia device form factors of choice for commercial and industrial settings. With all these factors ideally lining up, mobility in the contact center is a pioneering idea whose time has definitely come. Now the only question is: Are you ready to make the move? **M**

*Rick McFarland is CEO of Voice4Net ([www.voice4net.com](http://www.voice4net.com)).*





# The Evolving Role of Process Automation and the Customer Service Experience

**G**ive contact centers credit. In their effort to improve customer service and increase the effectiveness of how service is provided, many centers have made significant investments in technology as well as people. One payoff has been contact center automation and the efficiency it produces for managing customer interactions. Yet, bottom line, the pressure remains to improve service processes overall and reduce costs at the same time.

To that end within the service chain, the process improvement focus is shifting from front line agents to back office support staff, subject matter experts, field service teams, etc. – components that indirectly serve the customer, but that directly impact cost and service outcomes. Can automation improve the way these indirect resources perform? Certainly it can. The key is to extend automation and its best practices from the contact center to customer service processes and touch-points throughout the organization.

## Process automation via the organization's communications platform

In the contact center, interactions of all different media types are initiated, routed, delivered and processed efficiently using processes automated via the communications platform. Information can be handled similarly. Think of routing a customer's account record alongside an incoming call so the agent gets a "full view" of that customer and can tailor service accordingly. Where service processes often break down is outside the contact center, in the hand-off of post interaction work activities to other areas. An emerging trend therefore is to leverage the organization's communications infrastructure to drive process automation across the enterprise, uniformly and consistently, as opposed to deploying various automation products at different stages of a service process and expecting them to work in sync.

Using a communications platform's ACD and "push" technology, for example, organizations can route and assign process work anywhere in the enterprise in an intelligent automated manner. In particular for post interaction work processes, an organization can leverage its communications platform to support complex logic operations such as parallel tasks, conditional branching, wait steps and similar functions. With a single system to automate and manage every touch point of an interaction – from the time a customer first connects with an agent through all the knowledge workers involved to provide service – the service process is more holistic, and far more likely to produce an improved outcome.

Make no mistake, however. Any sustainable process improvement for customer service involves more than just technology. Factors such as the culture of the organization, historical service performance and customer feedback, corporate objectives, the industry a business is in and associated regulatory considerations can influence which processes to address, and how those processes are redesigned or modified.

## Interaction delivery processes to improve post interaction workflows

To handle incoming interactions with greater precision, an automated contact center process can typically integrate a rules-based workflow to match a customer's issue to an agent's skills and availability. Post interaction work, in most cases, is less structured. Beyond the agent, a customer's issue is often circulated to a pool of knowledge workers as a broadly defined request type, such as a "Billing Question." With little insight as to the history of the request, its status, who should handle it and what's required to resolve the issue, managing the request after the initial interaction can get cluttered and leave a customer frustrated. One potential solution is an interaction delivery process.

Applied to post interaction work outside the contact center, interaction delivery best practices can be used to accurately route requests to the appropriate servicing entity in the enterprise, such as a knowledge worker in Accounting. Post interaction work delivery can be based on operational business rules for servicing objectives (e.g., Response Time) and resource availability. Criteria for a specified customer and their request can also identify the knowledge worker type responsible for servicing the request. In almost all cases, delivery logic is executed via automation.

On a service level, an interaction delivery process for post interaction work can help ensure that accurate results are being provided to the customer, since those results are coming from a qualified resource assigned within the organization. On a cost level, by eliminating additional interactions from a customer to request an update on their issue or rectify inaccurate information, the business reduces both the direct and indirect cost to "re-service" the request. Mostly, by automating service processes end to end and consistently meeting objectives such as Response Time and First Call Resolution, the customer experience is a more positive one. **M**

**Download the complete whitepaper to learn more:**

**The Evolving Role of Process Automation and the Customer Service Experience**

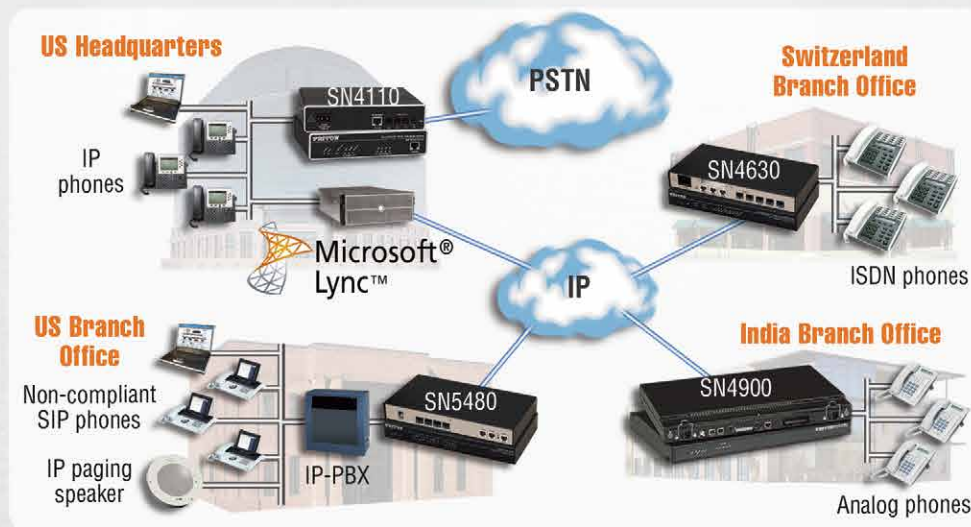
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## Pronexus Launches New IVR Toolkit

**V**BVoice 8 is a new IVR toolkit now available for free download from Pronexus. This new release now allows developers to build IVRs using any tablet running a .NET environment and offers a variety of other added features.

Keri Fraser, Pronexus director of marketing, explains that enabling users to leverage their touchscreens to do drag-and-drop IVR development introduces a whole new level of ease of use. She adds that Pronexus is all about reducing barriers to entry for its solution.

"VBVoice 8 is a dynamic tool with support for Windows 8, Visual Studio 12 and Windows Server 12," says Gary Hannah, president and CEO of Pronexus. "IVR developers can now develop with the swipe of a finger using the touch-screen feature of a Windows tablet. We are thrilled to provide developers with the power of the feature-rich Microsoft suite through VBVoice 8. Pronexus expert architects have once again hit the ball out of the park with a product that will change the way developers develop."

VBVoice 8 is now available for free download at the Pronexus website. Free with that are 10 days of support, and two run-time licenses to test IVR creations.

Other new features introduced as part of the VBVoice 8 release include Online .net help –with content from release notes available within the toolkit; improved capacity on a single application, which enables larger applications using VBVoice 8 and reduces costs because less hardware is required; and virtual machine support, which provides an easier way to control the licenses and reduces the cost of hardware for production system.

Also with this release, log names for all include the year, allowing for ease of organization and improved searchability; and the installation package automatically removes the old installation.

A 20-year-old IVR specialist, Pronexus makes its money by selling additional run-time licenses, reselling boards from such companies as Dialogic, and offering speech licenses to allow developers to enable speech recognition on their IVR applications. Pronexus customers include such companies as Alfapi, CBA, First Bank, and Howard Day and Associates. **M**

**This new release now allows developers to build IVRs using any tablet running a .NET environment and offers a variety of other added features.**



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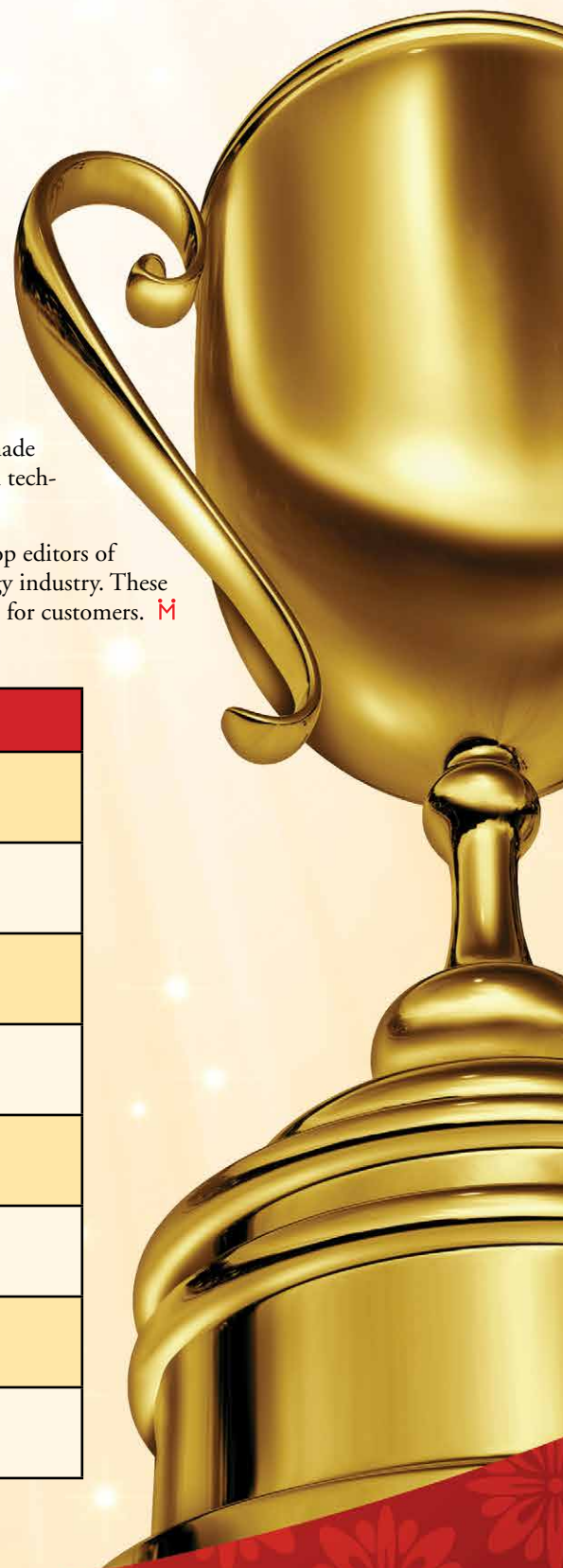
## TMC, CUSTOMER Recognize Speech Tech Excellence Award Winners

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The 2013 Speech Technology Excellence Awards recognize companies that have made significant contributions to improving speech applications for their clients. Speech technology has become more prevalent in both wireline and mobile applications.

Winners of the Speech Technology Excellence Awards have demonstrated to the top editors of CUSTOMER magazine that their products are exemplary in the speech technology industry. These products have proven superior capability and ultimately improved the bottom line for customers. **M**

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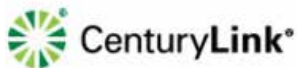
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**Erik Linask,**  
Group Editorial Director,  
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## Aspect Buys Voxeo, Rounds Out Its Cloud and Multichannel Capabilities

Customer service used to be relatively simple – when customers had a question or problem, they called a call center. But technology has evolved, so have the customers, quickly taking hold of mobile, social, and multichannel communications capabilities in their daily lives, extending those expectations to their customer service demands. No longer is a simple call center enough to deliver a valuable customer experience. The game has changed, and the ability to integrate mobility, multichannel capabilities, and self-service into the customer service environment has become an imperative.

“It’s the sweet spot of the innovation that’s occurring in the transformation of the customer experience,” says Chris Koziol, president and general manager of the Interaction Management division at Aspect. “Customers want to be able to interact with their brands wherever, whenever, and however they choose, and companies that restrict that ability or can’t accommodate that request are really going to be left by the wayside.”

That understanding is a key reason why Aspect is spending \$150 million to acquire hosted/cloud and on-premises IVR and multichannel platform provider Voxeo. The two already have many common deployments among the 2,000 Aspect and 700 Voxeo customers but, more importantly, the opportunity is an opportunity to heighten Aspect’s position in what has been a transformational customer experience market, by combining the two businesses’ offerings to create an integrated product offering addressing the holistic needs of any business.

Aspect has long understood the importance of a unified communications strategy in the contact center, but the mobility, IVR and self-service capabilities on which Voxeo has built its business fill some holes in the Aspect portfolio, now enabling it to expand its

addressable market with a combination of on-premises, hybrid, and cloud offerings that will meet the needs of Fortune 100 enterprises all the way down to the lower end of the SMB market. Likewise, Aspect’s contact center capabilities are highly complementary to Voxeo’s business, which, somewhat ironically, has struggled to make major inroads in the contact center space.

Perhaps the greatest value, as cloud computing continues to grow and as many contact centers look to the cloud as an alternative, comes in Voxeo’s six global data centers and two NOCs, allowing Aspect to extend its cloud and managed services offerings. Koziol and Voxeo CEO Bob Ingalls agree that cloud is here to stay, making the ability to support customers looking to migrate partially or fully into a cloud or managed services environment critical to continued growth.

“Cloud has allowed us to grow some small customers into big customers,” notes Ingalls.

Certainly, Aspect could have built its own IVR and multichannel solutions, but the pace of change in the market demands the vendors be able to act swiftly. This deal allows Aspect to accelerate its growth in the integrated contact center market while increasing flexibility with multiple deployment and payment models.

“We have seen considerable evidence that the market sees a significant value proposition in the combination of Voxeo and Aspect solutions,” notes Koziol. “We see it as a way to accelerate our overall offering and build positive momentum to drive organizational top- and bottom-line performance.”

While there will be tight integration between the two solution sets beyond the APIs Voxeo has developed, the acquisition furthers Aspect’s strategic position that success requires an ability to thrive in a multivendor environment. While full integration will increase the value of the combined solution for many customers, the ability to coexist in competitive environments with the likes of Cisco, Avaya, Genesys, and others will help Aspect accelerate the deployment of many capabilities its customers require, whether that includes IVR, outbound dialing, mobility, WFM, integration with Microsoft enterprise solutions, or any of the other capabilities from either solution.

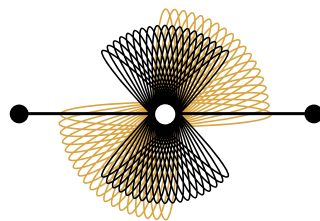
The flexibility of being able to integrate with competitive vendors only increases Aspect’s value proposition, allowing customers to leverage their existing communications investments while building out their customer service capabilities.

Despite its commitment to a multivendor market, the acquisition positions Aspect well in the competitive landscape as a full replacement to existing implementations. Now it is able to match its offerings squarely against any vendor, including Avaya and Genesys, Cisco, Interactive Intelligence, and Five9 and InContact. **M**





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