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Calabrio President and CEO Tom Goodmanson with a Keurig machine from client Green Mountain Coffee

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Calabrio Helps Green Mountain Coffee Better Manage, Analyze Its Contact Centers

M&A Mania: Leading Companies Expand via **Acquisition**

The **Problem** with **NPS**

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Rich Tehrani,
CEO, TMC

IBM: Digital Darwinism May Kill You

In a candid IBM interview, Carl Ford of Crossfire Media spoke with Blair Reeves, product marketing manager for EMM at IBM Software Group, who said companies should spend less time on advertising and worrying about various channels and instead focus more on putting customers at the center of their business.

He went on to explain that everything is part of big data – there is so much data going out there not only on the marketing side but related to how people are buying and selling. Another interesting point he made was this, coupled with social information, can be used by companies to serve their customers better.

Some types of data he mentioned are as follows:

- what customers create – what they post to Facebook about their likes and dislikes;
- what/where/how customers buy and what they do with their purchases; and
- how they engage with brands and companies – through stores, kiosks, contact centers, mobile apps, etc.

These are not discrete experiences, he said, they are part of a larger omni-channel experience. Reeves went on to explain these challenges are cultural and organizational as much as they are technological. He concluded by saying sometimes it is even a political issue.

> **Digital Darwinism is the process in which companies that move and adapt quickly win over those stuck in the past.**

Perhaps the most compelling part of the interview was a reference to digital Darwinism, which he described as the process in which companies that move and adapt quickly, making smarter investments and moves with their customer base, will win over those stuck in the past.

Citing an example, he mentioned that an airline he flew on to France allowed him to access flight information quite easily. He hates dealing with currency, he explained, which is why he paid for his luggage fees online. The company provided a rich experience and a lot of customer value. He was able to tweet with the company when he needed to communicate, and he received real responses that helped answer his questions.

The airline had a single view of all his communications and information, he said. He contrasted this to his ISP, where none of the people he contacted on the phone and on social networks seemed to know what was going on. He had to constantly repeat the same information about his contact data and more. When the technician came to his house he realized that the person had not been told what the problem was, and he had to repeat it all once again.

His point was the last-mile market had little competition, which explains why there hasn't been much focus on the customer. Google Fiber, he surmised, will finally disrupt the ISP space.

He went on to discuss the Watson Customer Engagement Advisor, which will allow customers to have their questions understood in context so questions, problems and complaints will be responded to in real-time. He said this will provide a lot of value for customers.

And he tied this into IBM's Smarter Commerce and Smarter Planet strategy – where the world will better cope with the increasing amount of information it has and use it in a meaningful way that provides value to people's lives, building a world in which it is a lot easier to live.

NOVEMBER 2013 • VOLUME 31, ISSUE 13

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CUSTOMER® magazine is published monthly except during February & August by Technology Marketing Corporation, 800 Connecticut Ave 1st Fl. East, Norwalk, CT 06854-1628.

To Subscribe, Call: 203-852-6800

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

Circulation Director, **Steph Thompson** (sthompson@tmcnet.com)

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

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CUSTOMER® magazine has been the voice of the industry since 1982. It is written by industry practitioners for industry practitioners and is regarded worldwide as the "Bible" of the industry.

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A Technology Marketing Publication
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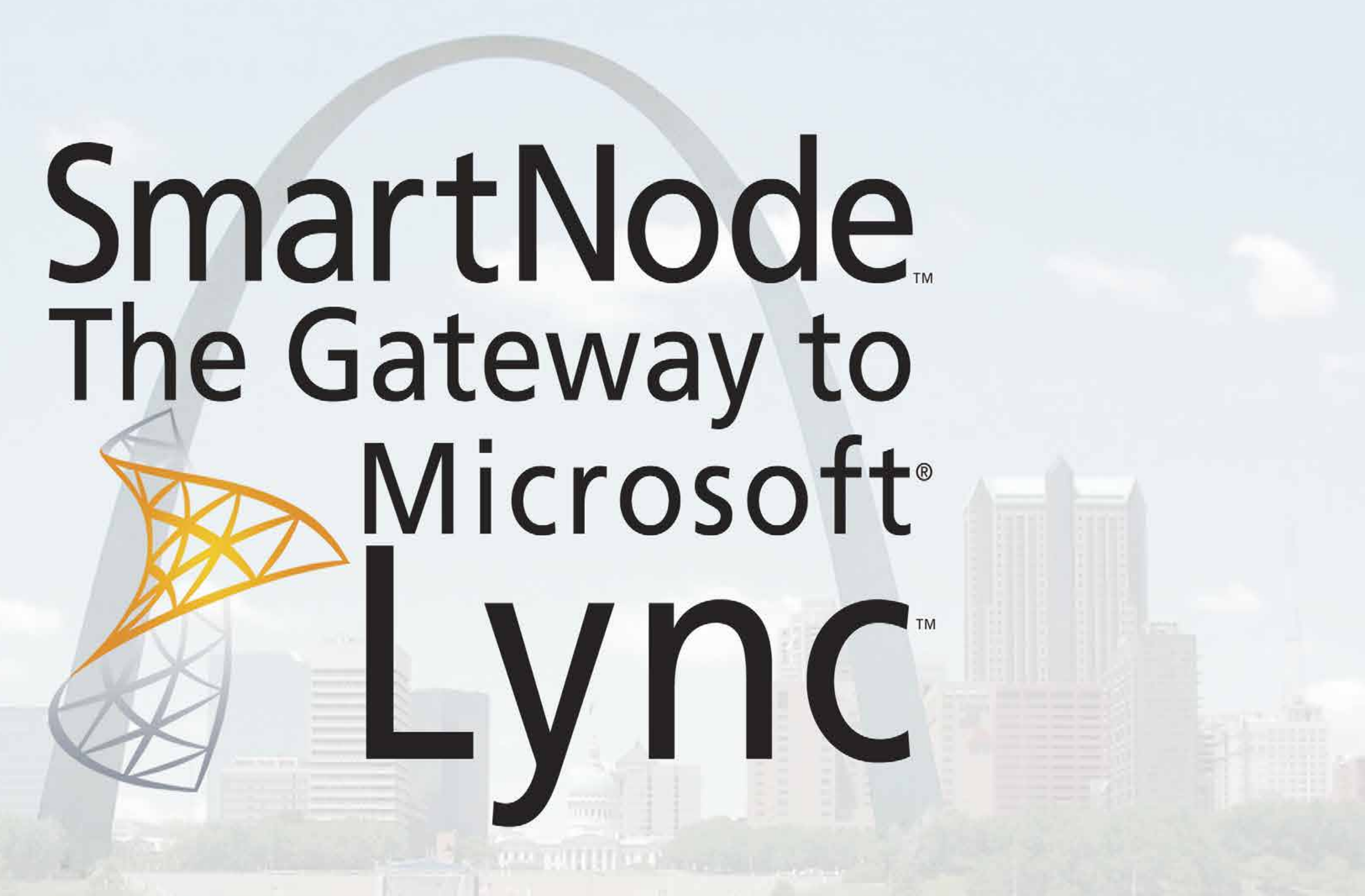

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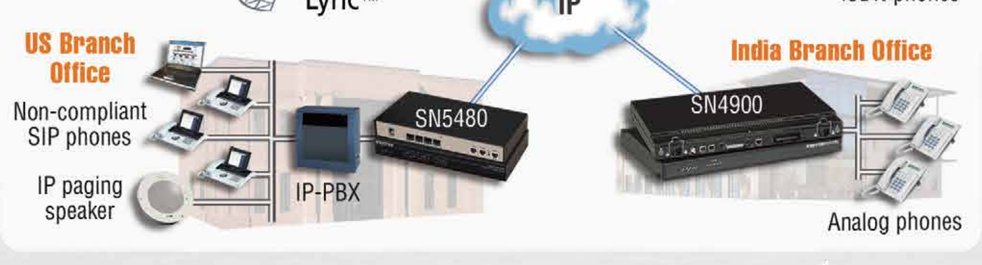
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Paula Bernier,
Executive Editor

The Real Deal

The scene in the movie Moneyball in which a group of scouts sits around a table opining about the pros and cons of various baseball players really paints a picture.

These scouts – fixtures of Major League Baseball – voice their approval of those who seem to be the most promising prospects based on their good looks and style. And they discount potentially valuable players because of an unorthodox pitching style or, even, an unattractive girlfriend.

It shows how, in the past – and to a great extent even in the present, the actions of people and organizations have relied heavily upon personal impressions and gut instincts as opposed to actual fact.

This is true whether you're talking sports, politics, marketing, or just about anything else.

Professional sports teams now capture and analyze every move of their own athletes as well as those of competitors. Data analysis is even happening at the foundational end of atheletes. For example, my husband is the statistician for our 13-year-old daughter's softball team, using specialized softball software to track how each player reacts to every pitch, and capture the path of every hit ball.

While emotions will always run high in both sports and politics, the sport of politics is also getting more analytical – at least in some respects.

Nate Silver put the importance of data analysis center stage during the 2008 U.S. presidential election, in which he correctly predicted the outcome in all but one of the 50 states. (As an aside, it's interesting to note that Silver has one foot in baseball and the other in politics. He first gained acclaim for developing a system for forecasting the performance and path of MLB players, then rose to prominence in political circles, and this year left The New Yorks Time to move to ESPN to pursue his first love.)

Now more organizations aside from just sports are trying to put data to work for them.

As Michael R. Levy, principal of market research firm GZ Consulting, recently noted, one exciting area on this front is to use predictive analytics tools to identify the key triggers and attributes of top customers.

"While historically, targeting was limited to segmentation based upon firmographics and job functions; predictive analytics identifies buying signals across a vast array of news, company websites, job boards, filings (e.g. patents, trademarks, UCC), social media, and other structured and unstructured information sets," Levy wrote in a blog he does for OneSource Information Services.

"From this broader set of sources and trigger types, you may identify new clients in non-traditional verticals and focus sales and marketing efforts on your top priority leads as scored by the predictive models," he continued. "Furthermore, the predictive models will recommend products and sales messaging in line with the mined intelligence."

Larry Freed, CEO of ForeSee and author of the new book "Innovating Analytics", recently told CUSTOMER magazine that while big data presents a great opportunity for companies to better understand their customers, there's also a need to rethink existing models for categorizing customers.

The Net Promoter Score has risen to prominence in recent years as a way for organizations to easily classify their customers as detractors, passives or promoters. But Freed said NPS has hit its peak and is on the way down because it's not a very predictive metric. As noted in his book, NPS has a high margin of error, is overly simple, and doesn't take into consideration that customers may at some times fit into more than one of these categories.

A better method for understanding customers, according to Freed, is what he calls the Word of Mouth Index.

"WoMI evolves NPS by measuring both likelihood to recommend and likelihood to detract from a specific brand by adding a second question," explained Freed. "'How likely are you to discourage others from doing business with this company?'"

The idea that the days of the NPS are numbered is not entirely new.

Earlier this year I met Matt McNerney, president at Ipsos Loyalty, Research & Consulting. He said NPS doesn't necessarily 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.

What organizations should be doing is looking not only at customer satisfaction but also at the competition, and their own rank in the market. 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.

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by **Paula Bernier**

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Calabrio Helps Green Mountain Coffee Better Manage, Analyze Its Contact Centers

Green Mountain Coffee sells a wide array of coffee, tea, and other hot beverages, as well as the Keurig machines to prepare them. Its single serving canister approach to brewing is unique, and Green Mountain continues to expand on the consumable brand and flavor options it offers. The company also has a forward-looking approach when it comes to its contact center, which relies on analytics, quality management, and workforce management solutions from Calabrio.

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In fact, Green Mountain Coffee has embraced the entire Calabrio ONE software suite. Additionally, says Nate Isham, network engineer III at Green Mountain Coffee, the company signed on to be the first user of Calabrio's latest feature – text analytics – even before it became publicly available.

The relationship between Calabrio and Green Mountain Coffee began around 2007, when the Waterbury, Vt.-based beverage company started its search for a workforce optimization solution. At the time, the company was still using spreadsheets for agent scheduling and had limited ability to gauge agent performance, so Isham was seeking an offering that could do workforce management as well as call recording/quality management. It also wanted a solution that was cost effective, simple to use and maintain, and could work in an integrated fashion. And because Green Mountain Coffee is a Cisco voice shop, it was seeking QM and WFM tools that could work with its existing Cisco gear.

In 2008, Green Mountain Coffee became a user of the Calabrio Workforce Management Suite and Calabrio Quality Management Software.

Calabrio fit the bill then, and it continues to deliver for Green Mountain Coffee as the company's business and contact centers have grown, says Isham. Calabrio provides reasonably priced solutions for the functionality available; offers great support through the customer lifecycle; an integrated login dashboard with various levels of access for different titles in the organization; and ease of installation, maintenance and use, he says. Green Mountain Coffee looked at competing solutions, and talked to some users of those products, says Isham, but Calabrio competitors didn't offer the same level of integration. Competing systems, he explains, also required users to log into multiple systems to view data. And maintenance of some competing systems "can be a bear" and thus require the IT staff to constantly babysit, says Isham, who wanted to allocate the time of his small IT staff to more strategic pursuits.

Green Mountain Coffee today uses the full array of Calabrio solutions at its eight contact center groups within the company as well as at its corporate offices.

Each of those groups has different call recording and quality management requirements. For example, Green Mountain's Montreal contact center records every agent-based call. While some Green Mountain Coffee call centers capture both inbound and outbound interactions, others record only inbound calls. In call center applications of Calabrio Quality Management, calls are recorded and scored to assess agent performance, assist in agent training, help understand the customer experience, and identify potential areas for business process improvement. Green Mountain Coffee, which Isham says spends a lot of time building agent scorecards and measuring agent performance, can use the Calabrio dashboard to review call center performance from the agent level, the team level, and based on various parameters. The beverage company also leverages Calabrio Call Recording for calls coming into the corporate receptionist; in this case, compliance is the goal.

Green Mountain Coffee also uses Calabrio Analytics. It uses the speech analytics module to help uncover trends and pinpoint call center systems issues. For example, if a customer complains about an IVR prompt that's linked to a particular call center campaign, but that campaign is no longer in operation, Calabrio's Speech Analytics can help Green Mountain Coffee identify that and update its IVR script to promote only current campaigns. For corporate calls, Green Mountain Coffee similarly uses speech analytics to ensure its IVR prompts are correct and useful. Isham says his company has seen a 5 percent reduction in calls to its receptionist as a result of IVR improvements tied to the Calabrio Speech Analytics implementation.

Finding the right balance between customer incentives and margin protection can be tricky. Green Mountain Coffee sought to uphold customer satisfaction by empowering agents to present coupons and other special incentives as a remedy for customer issues, yet it needed a system of checks and balances so agents had guidance and direction about when such offers were truly required. By applying voice analysis to customer service transactions, the company is correlating coupon and incentive offers to the root cause of complaints. This allows the business to provide clear direction to agents so they can remain empowered while still protecting margin.

Seeking additional improvements, the company recently deployed Calabrio Desktop Analytics as well. It is using this software both for PCI compliance and to assess what agents are doing with their time both while on calls and while between calls, says Isham, who adds that Green Mountain Coffee was able to get this solution up and running in just a couple of days.

Using Calabrio's Speech and Desktop Analytics Green Mountain Coffee was able to identify a handful of positive practices by select contact center agents, which it then added as best practices. For example, Calabrio Desktop Analytics revealed that some Green Mountain Coffee agents were using the Sticky Notes accessory within Microsoft Windows, as opposed to a sheet of paper, to write down details about their interactions with customers. That is a good idea, since it allows data to more easily be moved into Green Mountain Coffee's CRM system for future use. So Green Mountain Coffee made that a company best practice.

Green Mountain Coffee's implementation of Calabrio Text Analytics was also just getting off the ground at press time in early October, but this effort involves applying text analytics to the e-mails that Green Mountain Coffee agents send in reply to customer

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Calabrio President and CEO
Tom Goodmanson

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inquiries. The endgame, Isham explains, is to find areas in which the company can improve agent performance and marketing campaigns.

"Up until a couple weeks ago, we didn't realize Calabrio Text Analytics would allow us to take e-mails and score agents' experience with that e-mail," says Isham.

"There's so much talk about phone calls," he adds, "but we need to put tools in place to monitor and score against e-mail. So at the Calabrio User Group conference we learned about Calabrio Text Analytics, which we'll be implementing with e-mail in the next couple months."

Calabrio has been more than just a software provider to Green Mountain Coffee, adds Isham; it's been a partner in helping Green Mountain Coffee and other customers meet their business goals. Customers such as Green Mountain Coffee express their needs and opinions to the company via the Calabrio User Group. The group has regional meetings as well as a nationwide annual conference at which Calabrio, its vendor allies, and customers, talk about their needs and discuss product roadmaps. C-level management at Calabrio actively listens, Isham says, adding that 64 percent of the new features in Calabrio's latest product release are things customers specifically requested.

Indeed. Calabrio continues to enhance its products to better meet customer needs and market demands. For example, the Calabrio ONE Workforce Optimization Suite, which is ranked as a visionary solution by the Gartner Magic Quadrant for Contact Center Workforce Optimization, in its latest release was enhanced to embrace social and mobile technology. The software now can run on an iPad or other wireless device. Calabrio also improved and simplified the software's user interface, consolidating 140 screens to just 40, and instituting wizard technology to help users avoid mistakes during data input.

"With more channels, more devices and more systems to connect to, the tasks of planning and analyzing today's contact center interactions continue to become more complex," says Paul Stockford, president and chief analyst at Saddletree Research. "Calabrio has established itself as an industry leader in terms of making contact center optimization simple and attainable."

Calabrio President and CEO Tom Goodmanson comments: "I don't want my customers to need data scientists to use our tools. We employ data scientists here."

Those Calabrio data scientists build software that is easy, personalized and smart, so customers like Green Mountain Coffee can spend more time on what they do best.

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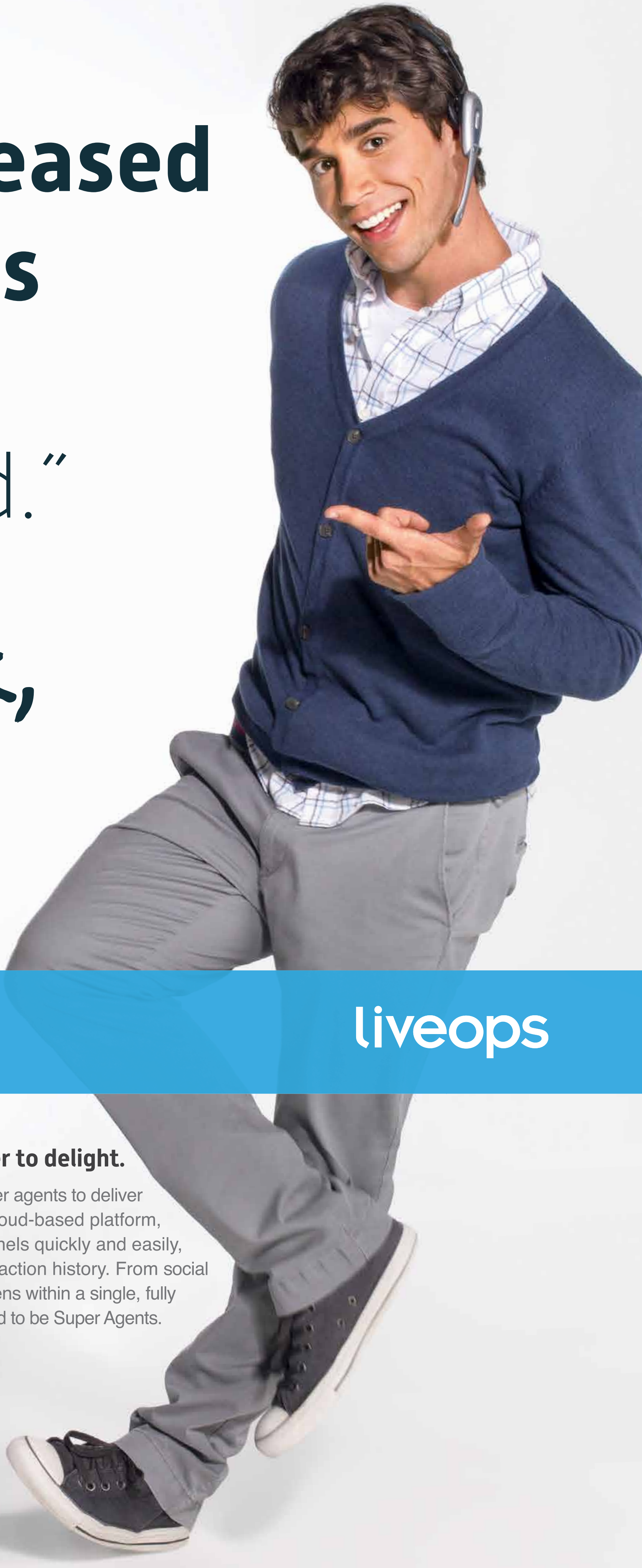
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Elaine Cascio

Reinventing the Customer Experience

Most companies have adopted the language of customer experience by now. But often there is little thought to what's driving the customer experience. Whether you have a clear strategy or if you've never really built one, now may be the time to re-evaluate and possibly reinvent your customer experience. Here are five things you can do to drive a positive experience.

1. Reconnect with corporate strategy and goals.

What is your company's mission and vision? Are they clearly articulated? Who are your customers today, and do they differ from target customers in the future? Has your customer population changed in the past several years? For example, mobile phone providers are dealing with a more diverse customer base as older demographics adopt the technology. Revisiting the customer experience ensures that all users are served appropriately. What does the competitive landscape look like for your company? Has it changed recently and should your customer experience change accordingly?

2. Understand what your customers experience today.

Here's where you step into your customers' shoes and engage with your company through all the methods and channels that they use. Develop customer experience journeys, map out what steps customers take to accomplish common tasks. Analyze channel usage to understand customer preferences, most used applications, where users stumble, and task completion rates. This data can provide a baseline for any improvements you make. Also look at consistency across channels – are the look and feel, the language, and common transactions similar across channels? Gather all voice of the customer feedback and surveys to understand key elements of the customer experience. Spend some time observing interactions in your contact center. If you don't have a budget for customer research, pull together a group of contact center agents to discuss what they hear from customers and how they would change the customer experience.

3. Map customer lifecycles and key moments of truth.

If you haven't created customer lifecycle maps that identify key moments of truth, start now. At what points in your customers' lifecycle do they reach out to you – is it for help or to complain? Clearly articulate how you deal with these moments of truth for all channels. Anticipate customer contacts and design proactive methods for reaching out to them.

4. Evaluate channels and identify opportunities.

With the wealth of channels customers have available, it's critical that we create a common customer experience regardless of channel. It's also important that the channels we promote reflect corporate goals. For example, if you manufacture very complex medical equipment, a sophisticated website can demo the features of your products to prospects with 3-D views, videos, and wizards that check compatibility with other products. And you'll need very knowledgeable agents (with great knowledge tools) to handle very technical, or medical questions. You may have experts on Facebook or LinkedIn, or expert user group forums for your customers. On the other hand, if your goal is to be a low cost provider, your focus will be on creating comprehensive and easy to use self-service.

5. Create measures of success that reflect your strategy.

A critical part of putting together any strategy is establishing measures of success. Focus on your goals at a high level and then drill down to the details. Make sure to orient them toward business results, not traditional contact center metrics (though you'll still need these). Your measures of success are derived from your strategic goals – so measures for a company that focuses on customer intimacy may include increased wallet share, lifetime value, or willingness to recommend. Make sure that measures are important to your customers, understood by your CEO, and that they drive real business results.

Elaine Cascio is a vice president at consulting firm Vanguard Communications Corp. (www.vanguard.net).

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ART OF THE CUSTOMER EXPERIENCE

Art Rosenberg

Contextual Customer Assistance From Online Apps For Better Customer Service

Visual online self-service applications will displace legacy IVR systems as more and more consumers use multimodal smartphones and tablets instead of legacy telephones. Such applications will pay off to business organizations, as well as to their customers, since they reduce contact center staffing requirements and also make it easier for customers to get information and perform transactions directly, while avoiding the need for live assistance.

Online self-services are hugely better than legacy IVR applications in many ways. So, there are clear benefits for any size organization, as well as customers, in moving in this direction.

There is one caveat, however, that I have also emphasized for any self-service application. That is that it must always allow convenient and flexible access to live assistance whenever customers run into a problem with the application they are trying to use. This will typically occur when the interactive user interface is not understandable to the user, and that can easily happen all the time.

Get a 70% discount by booking an airline flight online?

The other day I personally experienced such a frustrating need when trying to book an airline flight online. My motivation was the drastic discount deal offered (around 70 percent) if I booked it myself online within the next two days.

It takes a while to look up and select the available flights, then enter passenger and payment information. In my case I had some refund credits to apply, and the user interface was very confusing to understand what would actually be billed to my credit card. So, rather than guess about it, I decided to place a quick call for assistance, since the airline website did not offer a click-to-chat option.

When I placed my phone call, I got the typical "all agents are busy" recording, but instead of being placed into the wait queue, I was offered a "virtual queue" option with an estimate of 4-8 minutes of wait time for a return call.

That was OK with me and, sure enough, I got a return call in about 9 minutes. In answer to my question to the agent, I was quickly reassured that everything will be accurate by simply clicking the "accept" option. So, while still on the phone with the agent, I turned back to my computer screen and, guess what? It had an error message saying that it had "timed out" and I would have to start all over in entering my booking data. The agent told me she couldn't do anything else for me, because I would lose my big discount for booking it myself online.

When I got done doing all that again, I had spent over an hour doing something that shouldn't have taken more than 20 minutes, including any quick chat exchange with an agent. Not only did I waste a lot of time, but I was also really frustrated and undelighted.

Make all customer interactions multimodal, contextual

Obviously, the online application didn't know that I was trying to get live assistance through a separate phone call and timed out, and, obviously, the airline agent was blocked from getting involved, even minimally. This would have been a perfect situation for contextual click-for-assistance to close the gap and avoid any customer frustration when there was confusion about the self-service application interface. Given that there are thousands of business interactions for consumers who will be using smartphones and tablets for e-commerce, the need to provide convenient, flexible, and contextual access to live assistance is going to be table stakes for cost-efficient customer satisfaction in the future.

In my case, if I could have initiated contact with a booking agent directly through the application online interface using something like WebRTC, instead of a separate, toll-free POTS phone call, I could have avoided the unnecessary application time-out and need to repeat all my previous data entry input. On the other side of the coin, the agent that I connected with, voice or chat, would have had complete access to my contextual status information and would have been able to quickly satisfy my needs in just a couple of minutes without jeopardizing the online discount I was getting for doing all the data entry chores.

So, that's where I see lots of change coming to customer services.

Art Rosenberg is The Unified-View/UC-Strategies Expert (www.ucstrategies.com).

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Focus on Value

How to Get a True View of the Customer Experience Your Company Delivers

Capturing the customer experience is kind of like photography. You can see a fair amount of detail if you focus on one thing, but looking at the larger scene can give you a more accurate idea of what's really happening.

"To truly understand your customers' experiences, you need the full picture," explains Joe Alwan, vice president and general manager of AVOKE Analytics.

That means recording, listening to, and analyzing calls from beginning to end.

Many of today's feedback programs and recording systems begin listening at the point where a customer first connects with a contact center agent, and end when that interaction has concluded. But these conversations typically represent just a sliver of the customer call experience. Most customers' experiences also involve navigating the IVR, waiting in queue, speaking with one or more agents, and having their call transferred at least once. Important information about the customer experience can be gathered throughout that journey.

"By examining the entire experience – from dialing to hang up – your company can capture vital metrics about its contact center and identify areas of improvement," Alwan says. "It is through understanding the end-to-end caller experience that companies can move toward delivering better service and meeting the needs of each and every customer."

During a recent webinar, Alwan demonstrates that it's not uncommon for callers to voice their opinions and frustrations while responding to IVR commands and while waiting in queue. Systems that log parameters like hold times can be helpful, but they're no substitute for the words and emotion a customer's voice can convey. This kind of commentary can help reveal customer frustration and offer guidance on how to improve business processes. If systems aren't in place to capture these comments, a company's opportunity to deliver a better customer experience – and to become more efficient and profitable in the process – are lost.

"The IVR is your front door," says Alwan.

That front door can welcome callers and help them easily find the answers they're looking for, or it can lead them into a maze of complex paths and frustrating voice prompts. If they navigate their way to an agent, callers may be in an agitated state of mind when they finally have the opportunity to speak with someone. And that not only leads to customer dissatisfaction, it can also extend the time it takes for the agent to address the issue.

Following a call through transfers and until the customer hangs-up can also reveal a wealth of information, says Alwan. For example, a recording from one AVOKE Analytics customer featured a conversation between a caller and agent which was suddenly interrupted by an automated message saying the call couldn't be completed, and the caller was abruptly disconnected. Traditional call center tracking systems would log this as a completed call, but the reality – as captured by an end-to-end feedback solution – reveals it is quite the opposite.

This takes us to the caller and agent interaction. A wide variety of systems are available and in use today to capture these audio interactions. However the question here is whether they are actually providing helpful feedback to improve overall cost and customer experience. Although recording just the caller and agent interaction offers insight into improving agent performance, it fails to uncover valuable improvement opportunities based on the entire customer experience.

While the ideal is for calls that require a personal touch to be resolved by a single agent, we all know this isn't always the reality. Oftentimes, callers are sent on to other agents or subject-matter experts. Sometimes these individuals are in the same room as the initial agent, but sometimes they are in a different department, a different building or even a different company. End-to-end recording solutions like AVOKE Analytics enable companies to follow and continue listening to calls as they move across agents, buildings, geographies, phone switches, and even partner companies.

To learn the benefits of listening to your customers' complete experiences, listen to Joe Alwan's recent AVOKE Analytics webinar, which is now available on demand at http://www.crmxchange.com/webcast/whole_call/avokebbnsept2013.asp

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by Brian Moore

Navigating the Customer Communications Compliance Minefield

Consumers expect a certain level of communications and real-time updates on all aspects of their lives. From doctor's appointment reminders to missed payment reminders to flight delay notifications, consumers want proactive updates from the companies they do business with. However, considering the multitude of state and federal rules that govern how and when businesses can contact consumers, meeting these expectations is no easy task.

What's Your Purpose?

It's most useful to think about the purpose of your communication first, as that will determine which regulations will apply. For example, the Telemarketing Sales Rule applies to, you guessed it, telemarketing. The same goes for various state laws – there are more restrictions placed on marketing communications than on purely informational messages.

When it comes to the Telephone Consumer Protection Act, this think purpose first approach is critical. For instance, the rules will vary based on whether the call is for telemarketing, collections or informational purposes. If the communication is for telemarketing purposes, the rules are much stricter than if they are for informational purposes.

Form Matters

Beyond purpose, rules also vary based on what channel the business plans to use. Under the TCPA, a company must have prior express consent from the consumer before contacting them on a mobile device using an autodialer, recorded message or SMS text. And the consent must be written if the purpose is marketing. For collection agencies, there is also the federal Fair Debt Collections Practices Act and regulations in most states to pay attention to when it comes to how you deliver a message.

For example, take the issue of leaving a message on an answering machine. The FDCPA requires collection agencies to make it known that just about any communication they initiate is an attempt to collect a debt. But, when they instead reach an answering machine, they find themselves between a rock and a hard place.

That's because the FDCPA also prohibits disclosing to a third party (someone who is not the debtor) that a communication is an attempt to collect a debt. Since the agency can't know who will listen to the message, they are at risk of violating the FDCPA if they do disclose why they called and if they don't.

State vs. Federal – Competing Regulations

On top of federal regulations like the TSR, TCPA and FDCPA, there are state laws that may conflict with federal regulations. For example, the TCPA allows telemarketing (when it allows it at all) only between 8 a.m. and 9 p.m. customer local time. But various states have also weighed in on this topic – many prohibit calls before 9 a.m. while others say you can't call after 8 p.m. One state even cuts you off at 5 p.m. and others say "not on my holidays."

How Technology Can Help

Since many of the rules come in to play based on the communication technology being used, it's only fair that the technology itself provide some protection against rule violations. Modern dialing systems, automated communications, customer interaction management solutions and integrated call records can all help meet and track compliance in several ways:

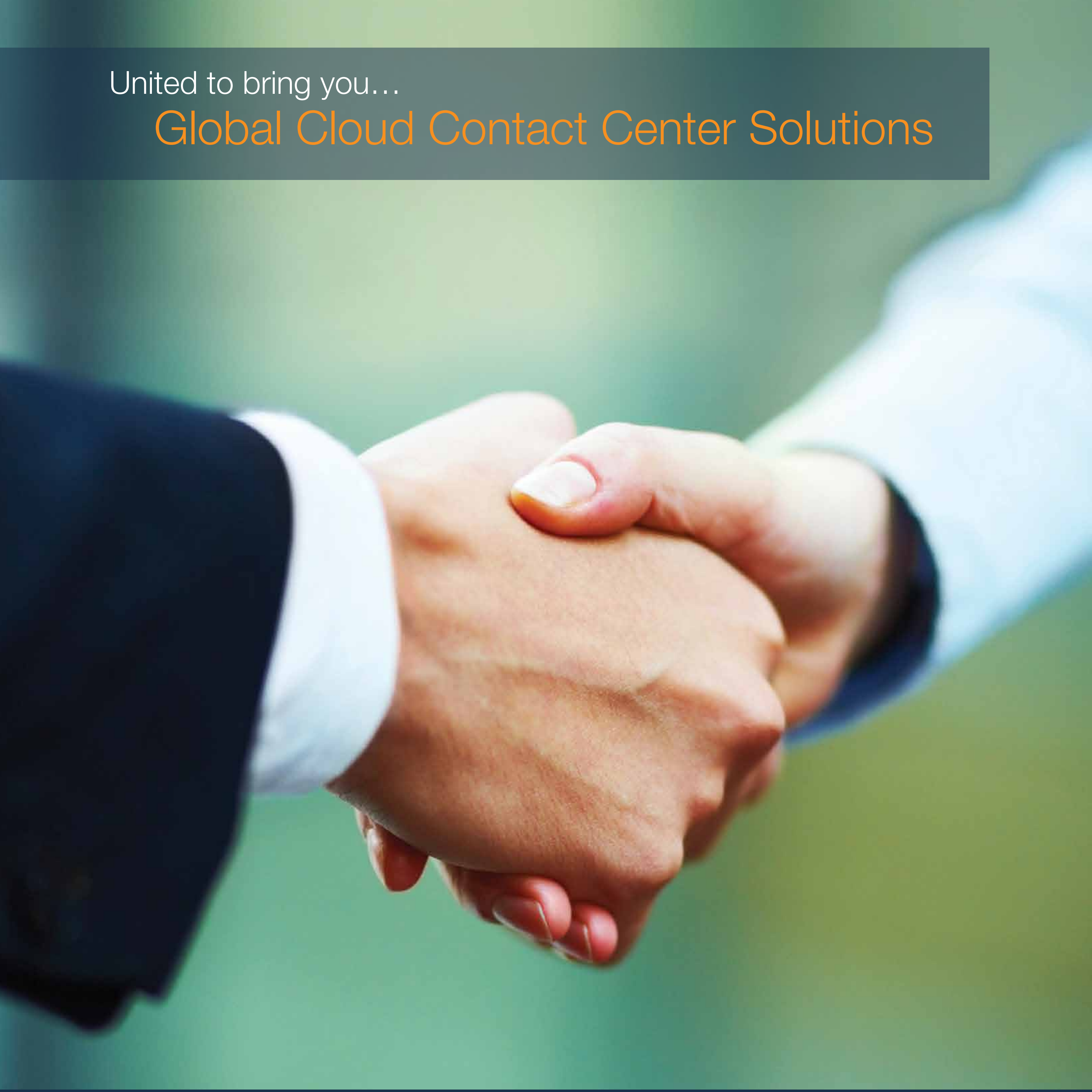
Automatically Compliant: Most modern dialing systems have sophisticated controls to monitor calling hours and holiday controls. The right technology system will enable companies to automatically configure guard rails based on individual state rules.

To Text or Not to Text: For mobile devices, being able to identify which numbers are mobile and which are landlines is critical for meeting TCPA regulations. Depending on the purpose of the communication, you must have either prior express consent or explicit written consent to message a mobile. If you don't, your only recourse is to filter out mobile numbers. Today's best systems can do this automatically.

The Devil is in the Details: Technology can also enable better documentation and tracking for compliance reporting. As difficult as it is to prove a negative like "we did not make that call", good record keeping is your best defense against claims of regulatory transgressions.

With a smart approach that looks at purpose and form first and leverages the right technologies to support that strategy, companies can successfully navigate the minefield of compliance and deliver the right message to the right person at the right time.

Brian Moore is the financial services market manager and resident compliance expert for Varolii Corp. (www.varolii.com).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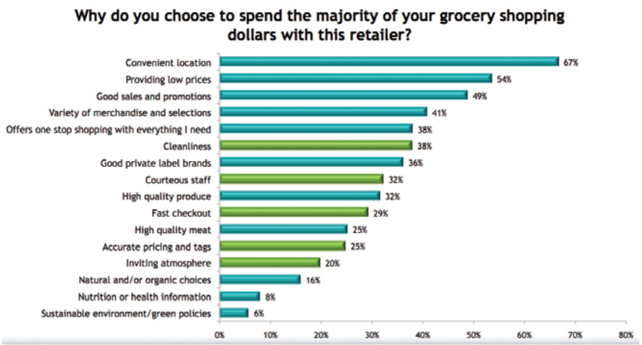
by Janet Eden-Harris

Winning with Grocery Consumers Is All About Convenience and Price. Or is it?

Time and again, surveys tell us that consumers value the same basic things in a grocer. It's all about convenience and price. In a recent survey that Market Force Information conducted among more than 6,500 consumers across North America, almost seven in 10 said that their primary reason for choosing a grocer was its convenient location. That was followed by 54 percent who said it was providing low prices. Good sales and promotions followed, along with a wide array of products and merchandise.



Consumers Value Convenience and Low Prices in Their Grocer

Other important factors such as cleanliness, helpful staff, quality meats and produce also score on the consumer's radar, but clearly don't drive as much loyalty as the big two: convenience and price.

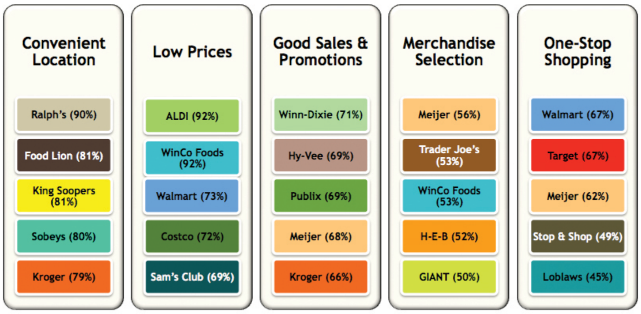
In an industry where margins are typically razor thin, that big two mantra actually makes it hard to innovate. Real estate is expensive. Prices can go only so low.

So, when we began looking at some of the other findings in our grocery study, we thought it worth sharing, if nothing else, to give heart to grocers everywhere. There are indeed things that grocers can do to win consumer loyalty that aren't nearly as costly as building new stores or battling it out for the lowest price.

The Table Stakes: No One Brand is Winning

If convenience and price are all that matters, you'd think that consumers would be delighted with the brands that offered the best of those big two. That's not so. When we asked consumers where they spent most of their grocery dollars, and then asked them to rank that brand on a series of attributes, we found that no one or two brands dominated in offering the most convenient stores, the best prices and promotions. Note the results in Figure 2. The percentages in each box reflect the percent of respondents who rated their favorite grocer a 5 out of 5 on each of these attributes.

Ralphs, Food Lion, King Soopers, Sobeys and Kroger score very high among their consumers on convenience. Meanwhile, WinCo and ALDI win on providing low prices. One-stop shopping? It's Walmart, Target and Meijer.

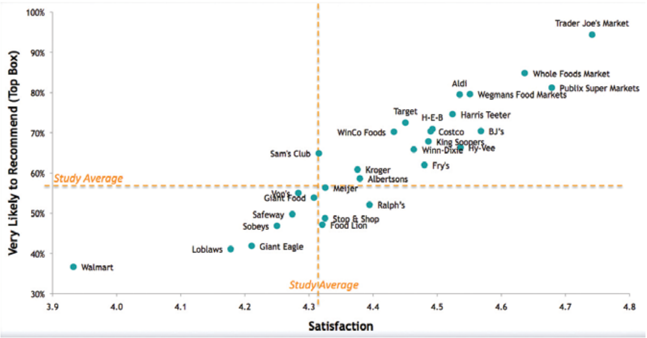


Convenient Location	Low Prices	Good Sales & Promotions	Merchandise Selection	One-Stop Shopping
Ralph's (90%)	ALDI (92%)	Winn-Dixie (71%)	Meijer (56%)	Walmart (67%)
Food Lion (81%)	WinCo Foods (92%)	Hy-Vee (69%)	Trader Joe's (53%)	Target (67%)
King Soopers (81%)	Walmart (73%)	Publix (69%)	WinCo Foods (53%)	Meijer (62%)
Sobeys (80%)	Costco (72%)	Meijer (68%)	H-E-B (52%)	Stop & Shop (49%)
Kroger (79%)	Sam's Club (69%)	Kroger (66%)	GIANT (50%)	Loblaws (45%)

Convenience and Price Rankings

Now take a look at how consumers rank their favorite brands on overall satisfaction and their likelihood to recommend that brand to others. Graph 3 is the 2013 Consumer Delight Index showing how brands stack up in delighting their customers. Brands that really delight consumers are in the upper right quadrant—with the highest scores for both satisfaction and their likelihood to recommend, which tend to go hand in hand.

Note how high the bar is for satisfaction. The average for this list of big grocers is a 4.3 on a 5-point scale. The lowest marks are for Walmart, but it received an average 3.9 satisfaction on a 5-point scale, which is hardly dismal. It's just that the competition in this sector is fierce.



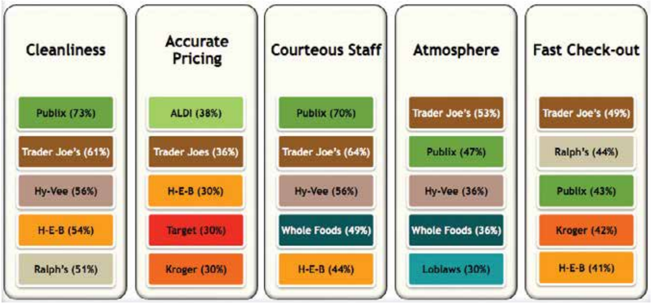
2013 Grocer Consumer Delight Index

Grocers that received at least 1% of the vote are included in this delight index

But does something seem odd here? The brands that are really delighting – Trader Joe's, Whole Foods, Publix, Wegmans and ALDI – aren't the most convenient, which is the attribute that consumers said was most important in their choice of a grocer. With the exception of ALDI, they're also not offering the lowest prices. What else is going on that's driving delight?

It's All About Operational Excellence

We kept looking at the data to understand this discrepancy. We didn't just ask the study participants about convenience, promotion and prices. We also asked consumers to rank their favorite grocer on operational measures like cleanliness, courteous staff, accurate pricing and fast checkout. When we tallied the scores, some interesting trends popped out. Those favorite brands that dominated the delight index also dominated in the operational measures.



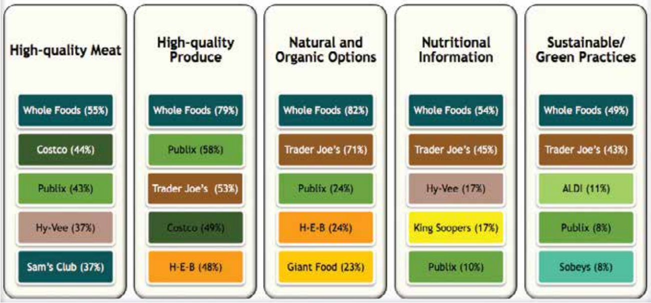
Cleanliness	Accurate Pricing	Courteous Staff	Atmosphere	Fast Check-out
Publix (73%)	ALDI (38%)	Publix (70%)	Trader Joe's (53%)	Trader Joe's (49%)
Trader Joe's (61%)	Trader Joes (36%)	Trader Joe's (64%)	Publix (47%)	Ralph's (44%)
Hy-Vee (56%)	H-E-B (30%)	Hy-Vee (56%)	Hy-Vee (36%)	Publix (43%)
H-E-B (54%)	Target (30%)	Whole Foods (49%)	Whole Foods (36%)	Kroger (42%)
Ralph's (51%)	Kroger (30%)	H-E-B (44%)	Loblaws (30%)	H-E-B (41%)

Top Grocer Operational Rankings

Trader Joe's, the overall winner in the delight chart, won top-two billing from its consumers in all five attributes. Publix was in the top three. Whole Foods was in the top four in two of the measures, while Hy-Vee and H-E-B – both solidly in the upper-right quadrant – also were top finishers in most of these operational categories.

Clearly operational excellence and consistency across stores are big differentiators in consumers' minds, whether they rank them as highly as the Big Two of convenience and price in surveys or not.

This trend was repeated when we looked at other attributes such as quality produce and meat, good private label brands, organic products and sustainability practices.



High-quality Meat	High-quality Produce	Natural and Organic Options	Nutritional Information	Sustainable/ Green Practices
Whole Foods (55%)	Whole Foods (79%)	Whole Foods (82%)	Whole Foods (54%)	Whole Foods (49%)
Costco (44%)	Publix (58%)	Trader Joe's (71%)	Trader Joe's (45%)	Trader Joe's (43%)
Publix (43%)	Trader Joe's (53%)	Publix (24%)	Hy-Vee (17%)	ALDI (11%)
Hy-Vee (37%)	Costco (49%)	H-E-B (24%)	King Soopers (17%)	Publix (8%)
Sam's Club (37%)	H-E-B (48%)	Giant Food (23%)	Publix (10%)	Sobeys (8%)

Top Grocer Quality Products Rankin

Whole Foods, Trader Joe's and Publix dominate, while ALDI, H-E-B and Hy-Vee also do well.

What can we make of all this?

Convenience and competitive prices are table stakes characteristics. Consumers expect those from their favorite grocers. But, grocers really differentiate through operational excellence and great products. The good news: Consistently delivering a great customer experience can be done. Executives can understand how individual stores are performing and immediately spot gaps in performance by investing in customer intelligence programs such as customer satisfaction surveys and mystery shops, listening to consumers through 1-800 contact centers and monitoring social media. Tying that data to financial performance is the key to showing executives what matters most to consumers and what specific behaviors will drive the highest satisfaction and financial results. And, investing in training and incentives to spur the right behavior is a critical way to close the loop.

It's not cheap, but all of those steps can be done for far less than building new stores or dropping prices below the competition, and they have an ROI that is tangible and easily measured.

So is it all about price and convenience? Yes. And so much more. M

Janet Eden-Harris is the CMO of Market Force Information (www.marketforce.com), a global customer intelligence solutions company for multi-location businesses, including major retailers, restaurants, grocery and convenience stores.

by **Paula Bernier**

Survey Says…

Low-Cost Options Threaten Giants' Prominence

Customer experience has become a key area of interest for many companies and organizations recently. But how do you really know what kind of customer experience you're offering and how you can make it better? One way is through customer surveys.

A study issued by Gartner in October reports that of those organizations that consider the customer experience, 95 percent measure the customer experience through customer satisfaction surveys.

Surveys, of course, are nothing new. Businesses have been doing them for years. In fact, the Nielsen TV survey in which families kept track of their viewing habits, is legendary. But traditional survey methods tended to be long-term efforts requiring a significant time investment from both surveyors and those surveyed.

There are still those companies who rely on diaries, or telephone calls at the dinner hour, to survey customers. However, new online tools make it easier and faster to create, distribute, collect and even analyze customer survey data.

SurveyMonkey really shook up the traditional survey space in the past few years when it introduced a cheap and easy way to do surveys online. The company was founded in 1999, and in 2008 became the recipient of one of the largest private capital investments on record. It reported $113 million in revenues, and had earnings of $61 million, last year.

Do-it-yourself type tools from SurveyMonkey, Mindshare (which bought survey company Empathica in September), Qualtrics and the like are at the bottom strata of the survey space, said Chris Cottle, executive vice president of marketing at Allegiance. They provide tools, and somebody at the user's organization needs to figure out how to use them and what they want from them, he said.

The second strata of customer survey companies are those that help customers develop a program to send out surveys in a systematic way over time, Cottle said. That's where Allegiance and ForeSee play.

At the top of the heap are heavy-duty market research firms. This is a $30 billion market with well-entrenched players such as such as Gallup, J.D. Power, and Walker Research, Cottle added.

But industry newcomers and new communications preferences are beginning to change the power structure among these three stratas.

A Sept. 4 Forbes piece said Gallup revenue was down at least 10 percent in 2012 to about $275 million.

"Gallup's troubles can be summed up in three words: the innovator's dilemma," said the article. "That term, coined by Harvard Business School professor Clayton Christensen, describes the sickness that ensues if you fixate on your high-end customers and ignore the market's low end. Cheap, new methods seep in, eventually disrupting a whole industry. It happened in steel, retailing and computer storage. It's happening again in survey research."

Creep from quick and easy solutions started in 2003 when the Net Promoter Score was invented (for more on NPS, see this issue's Angle column), challenging Gallup's lengthy and detailed customer questionnaires, the Forbes piece noted. These days, Gallup and its ilk have the added threat of newcomers like SurveyMonkey and Qualtrics.

The good news, said Danielle Wanderer, head of marketing at Qualtrics, is that survey market tools are now available to a wider array of companies and titles within those organizations. In the past, survey efforts tended to run through market research folks at a company. Now anyone in a company can fairly easily take the pulse of a select group, whether the person conducting the survey is interested in customer care, marketing, product development, or any other discipline, and whether those in the group are customers, prospects or employees.

While this expansion of surveys across organizations is a good thing in many ways, it also has created some fragmentation within companies, Wanderer said, adding there's now a "huge push" across enterprises to move to a single platform so they can track things like Net Promoter Scores.

That, and the desire for continued growth, has pushed companies like Qualtrics to try to go upmarket, she said, adding that some of the freemium tool providers that flooded the market have gone belly up. To ensure Qualtrics doesn't follow in their footsteps, Qualtrics has modified its pricing, which is based on seats and responses (as opposed to the number of surveys sent out), with different tiers for smaller, medium and large-scale businesses.

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...to this.
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Message: Customer needs product assistance ASAP
Caller: Customer #3128
Can be reached at: 654-555-3295
Receieved by: Steven
While you were out!
Time: 10:15 am
Message: No MSG
Caller: Client 762
Can be reached at: 655-555-1236
Receieved by: John
While you were out!
Time: 1:30 pm
Message: Client to close account.
Caller: Client 845
Can be reached at: 265-555-5478
Receieved by: Tom
While you were out!
Time: 12:15 pm
Message: Product exchange details from Sales needed.
Caller: Customer #437
Can be reached at: 966-555-7762
Receieved by: Christine
A
Need approval from Cust
B
Explain process
While you were out!
Time: 3:30 p.m.
Message: Client re-scheduled lunch meeting to next Tuesday the 7th.
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WE GET THE CLOUD

by **Paula Bernier**

SAP: Avoid Mobile Ad Spamming, Embrace Precision Retailing

Everything has changed permanently toward mobile, and we're never going back. That has triggered a growing wave of mobile advertising that continues to gain in strength. Global mobile ad revenue increased from $5.3 billion in 2011 to $8.9 billion in 2012.

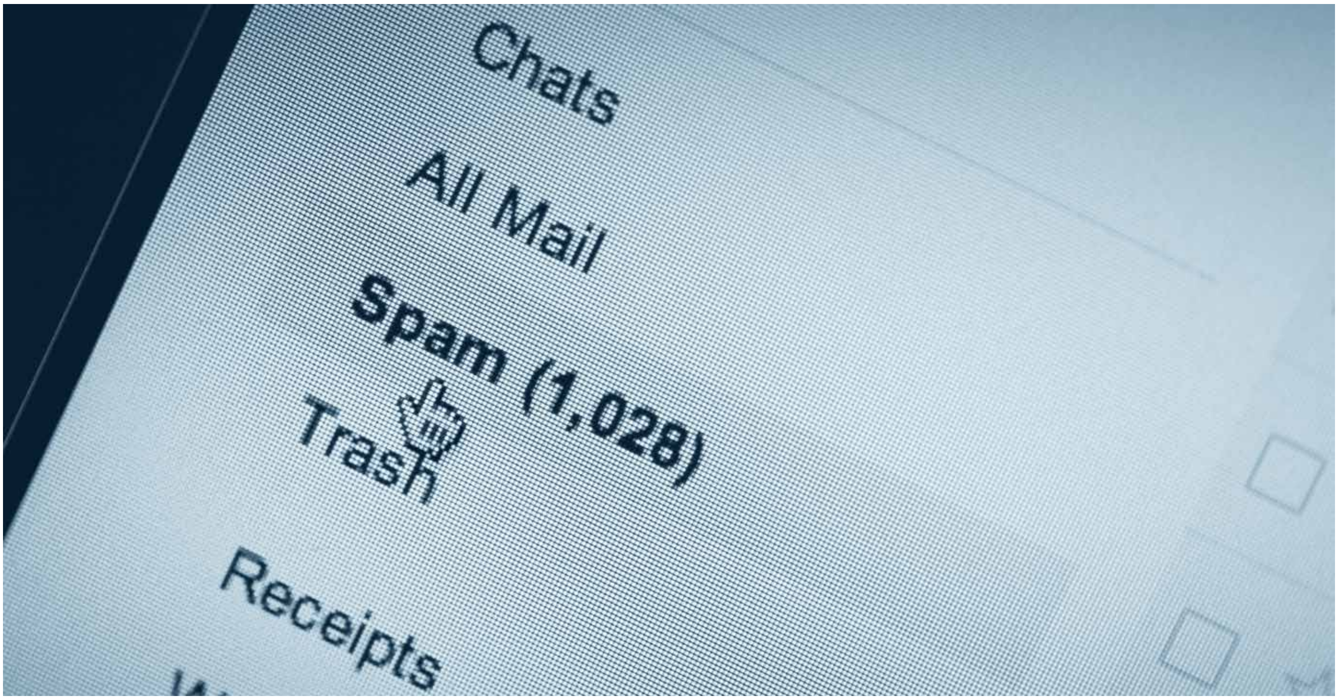
Personalization and tagging are prominent. And people are easily annoyed when they get communications, even from companies with which they've opted in, that don't speak to their interests.

This summary of the current state of being comes courtesy of Joe Fuster senior vice president of SAP Cloud sales, who suggests there is a better way to reach out to and engage customers with mobile advertising and offers. SAP calls it Precision Retailing. This is SAP's term for using geofencing and other triggers, and its own HANA application and database platform, to better target campaigns at mobile users.

Videotape kiosk company Redbox is among the adopters of this new approach to mobile marketing and advertising. It started using SAP solutions to help with supply chain challenges but has since expanded its usage of the solution to better understand customer behaviors.

Fuster notes that Redbox may locate its machines in various locations around a city. But just because a customer rents a movie from one site doesn't mean he or she will return it to the same location, he says, or rent from the same place next time around. However, Redbox does know that most people are consistent in returning movies to the same location, so the company has a pretty good idea of where those individuals are at a given time of day – perhaps returning a movie on the way to work in the morning. So that information can be used to formulate mobile ad campaigns with area businesses. And, when a customer returns a movie, that action can trigger the delivery of a coupon for breakfast at an area coffee spot, for example, or a promotion at a nearby drug store, or a deal on the next movie rental.

SAP is also working with STM, which operates the rail line in Montreal. STM uses the SAP solution to track when riders flash their badges at a entrance kiosk, which also provides information about where those riders are getting off the train. Understanding from which stations riders arrive and depart the trains enables STM and its partners to create promotions based on rider's individual locations and schedules. M



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by Christopher Gooley

Looking Beyond Marketing Automation

How to Use Big Data to Truly Get More Personal

When the concept of big data first infiltrated the marketing and CRM space, marketers across every industry rejoiced at the thought of having unprecedented access to minute details about their current and prospective customers. We reveled in the notion of mining this incredible treasure trove of information to uncover valuable insights that would help us hone our message, zero in on the right audience and, ultimately, grow sales and revenue.

Gaining this insider knowledge – VIP access to the needs, wants and desires of our target audience based on their broad scale behavior metrics – seemed almost too good to be true. And, with the promise of automation, we made plans to queue up marketing tactics like ads, e-mails and other communications based on this data, reducing the manual labor and guesswork involved in getting the right message to the right people.

Except, it wasn't quite the panacea we'd hoped. Instead of expertly leveraging these valuable insights, we quickly found ourselves buried in an avalanche of information. With too much data and too few resources to properly analyze and extract the most valuable nuggets, it became more of a chore – and more expensive – than it was worth.

Adding to the problem, bombarding audiences with ads, offers, landing pages, e-mails and more based on what we think we know from big data has begun to feel disingenuous. In short: Our customers are on to us.

At first, they were flattered that we seemed to know exactly what they needed. When they received our "You may also like…" upsell suggestions via e-mail or saw our product ads based on their previous buys, they saw it as a nice touch and thought that surely we must care about them and value their business to take the time to stay in touch.

> Blasting those fake, automated messages was akin to throwing a dart at a wall blindfolded. It might get some response, but it was nearly impossible to know if you really hit the mark.

But then, something changed: Customers found out about the massive databases storing all of this intricate detail. No matter how hard we tried to humanize them, our auto-generated, scripted messages became passé. Those e-mails that appeared to be a warm welcome or thank you from the CEO were exposed as the bulk mail they truly are.

To be honest, this approach wasn't really as effective as we'd hoped. Blasting those fake, automated messages was akin to throwing a dart at a wall blindfolded. It might get some response, but it was nearly impossible to know if you really hit the mark.

Worse yet, in customers' minds, it gave the impression that we apparently didn't really care about them at all – they were just one in many millions of database entries that we used to churn out spammy messages. When our audiences became a little unnerved by the Big Brother-ish feel of it all, they installed do not track add-ons to their browsers and locked down privacy settings on their devices to cut us off from gathering any more big data.

Clearly, it's time for a reboot in the way we use big data to cultivate customer relationships. Rather than trying to pass off a barrage of generic communications predicated on this data as warm and fuzzy personalized messages, the best approach may be to separate the wheat from the chaff and focus personalization efforts where they will truly do the most good – with our most valuable customers.

One way is to begin by analyzing buyer behavior to identify our most valued, loyal customers – those who purchase more, most often and provide positive product reviews or recommendations on social media. Then, invest the time, effort and money to build genuine, personal relationships with these MVPs to ensure they feel valued and appreciated. Avoid sending them boilerplate e-mails, generic mailers and canned communications. Use a real human touch where the investment is warranted.

For average customers, stop trying to fool them with fake auto-responder e-mails that the CEO didn't even know about, much less write. The truth is that these attempts to impersonate a human just ruin it for the rest of us who are working hard to cultivate real, personalized customer service. Even the most genuine e-mail, sent from an actual person, is now perceived as auto-generated, and quite frequently deleted by the recipient without a second thought.

To combat the misperception, CRM agents must now work even harder to prove they are real human beings by including detail, references and context only a real human would know. Of course, big data can also be helpful here, by giving us the information we need to get to know our customers before we even make contact. But, even this must be done carefully, to avoid scaring them off with too much information; otherwise, the specter of Big Brother begins to creep back into the mix. M

Christopher Gooley is CEO and co-founder of Preact (www.preact.io).

by Duane Edwards

Making Big Data Marketing a Reality: Build or Buy?

Nearly every operator is exploring how to capitalize on the promise of big data. Functional groups, ranging from customer support to network operations to marketing, have identified strategic opportunities for using big data to drive better decision-making.

CMOs in particular have focused their sights on using big data to drive better results. Making an investment in better understanding customers means the ability to leverage insights to more effectively differentiate the mobile experience by delivering better products and services and more value to customers.

Although the end goal is clear, many CMOs are asking: How do we get there and how long will it take? And this has IT asking: Do we build or do we buy?

There are several factors that contribute to the build vs. buy decision. Being able to handle the voluminous amount of data is part of the equation. Collecting, storing, and crunching the data – structured, unstructured, and semi-structured – is a critical capability, and one that is neither easy nor inexpensive when you're talking about infrastructure that leverages the latest big data technologies to harness data captured across the organization.

Another part of the equation is determining how to extract the information so that it brings value to the company. For the marketer, this means having the capability to first understand who a customer is and how he or she behaves, and then the ability to act on insights in an automated fashion on an individual customer basis.

There is also the question of scaling and being able to monitor the dynamic behaviors of millions of customers so that you can actually influence the decisions that they make each and every minute.

Many marketing and IT organizations, driven by top-down imperatives, are addressing the need for big data solutions to transform how they engage with and market to their customers to drive better results. In working with mobile operators across the globe, we've identified the key questions being asked as it relates to the build versus buy decision on big data marketing platforms:

Should marketing be a starting point for operators making an investment in big data?

The two groups leading the way with big data initiatives in the majority of operators are marketing and network engineering. Facing highly competitive environments, marketing organizations are consistently looking for every advantage possible for retaining existing customers and maximizing revenue opportunities with those customers. We have seen big data initiatives consistently result in quick hits as marketers have been able to act upon behavioral insights that have been lost in the aggregated customer metrics that are the cornerstone of traditional approaches to marketing.

> A considerable challenge has been in finding the staff with the skills and experience required to build a big data marketing solution.

How are marketing groups determining whether the value of a big data analytics platform justifies the investment?

Marketers have an innate confidence that the better you understand a customer and the more

you are able to personalize your interactions with that customer, the more successful you will be in achieving your KPIs, whether they be around revenue, churn rates, usage levels, promoter scores, or other metrics. They also have increasing confidence, supported by case studies from other operators pursuing similar initiatives, that a big data solution is a path to success. The question is how quickly the investment will realize the return. Projected returns are being established from both pilot projects and industry case studies. Determining costs has been easier for operators pursuing a buy strategy, particularly when working with vendors with success-based business models. On the other hand, the ROI calculation associated with a build strategy has been more problematic as the returns have been less consistent, the time frames considerably longer, and the costs subject to more unknowns and risk.

Is there a trend toward building or buying big data marketing solutions?

The early trend has clearly been toward buying solutions. A considerable factor in this trend relates to the business case around the solutions. The buy business case is generally able to show much less risk, faster returns, and greater certainty around returns and costs. The risk associated with a build decision is amplified by the state of the underlying technology required to construct an end-to-end big data marketing solution. Much of the vendor investment focus has been on the underlying infrastructure for storing and managing big data, while the technology to build applications to take advantage of big data have lagged, making applications extremely challenging to build. As a result, most operators have looked toward vendors that can provide complete, out-of-the-box solutions instead of embarking on the journey alone.

What are the primary considerations when making this decision?

First and foremost, operators are looking at ROI and risk. They are also looking at the strategic nature of big data across their organizations and at their own core competencies. Those that are confident in big data as a method to drive long-term returns are often starting with solutions they buy but keeping an eye toward ultimately bringing the solution completely in house and driving further development internally. Others will recognize they lack the core data science and engineering capabilities required to get the most out of big data marketing solutions and will instead strategically partner with one or more vendors with leading solutions and visionary roadmaps.

What are the challenges that operators building this type of platform are facing today?

A considerable challenge has been in finding the staff with the skills and experience required to build a big data marketing solution. Individuals with the requisite skills sets are in high demand and often quickly hired by the vendors providing the underlying big data technology and the applications, including marketing solutions, built on top of that technology. For those operators that have been successful in recruiting and developing their own staff, they still face significant challenges in building a solution. With limited tools, experience, and examples of successful big data marketing initiatives, efforts to build the solutions internally have been fraught with time and cost overruns and challenges with scaling, implementing data science, and achieving desired results.

Duane Edwards is senior vice president of product development for Globys (www.globys.com).

by Paula Bernier

Relayware Opens Lines of Collaboration Among B2B Partners

It's hard enough to manage and merge the strengths of people within one company or location. The challenges there only get hairier when organizations bring their channel partners into the mix. But a company called Relayware is working to make B2B collaboration multichannel, affordable, and simple.

The Relayware SaaS-based solution enables companies to manage joint sales planning, business planning, lead management, deal registration, renewals, onboarding, recruitment, and incentive initiatives. It also supports collaboration with and among the channel via multiple modes, including e-mail, IM and social networking. And businesses can use the platform to build portals and landing pages for various campaigns and extranets. The company even offers native mobile apps.

More than 30 customers – including Allstate Insurance, audio/visual company Avid, PC company Lenovo, document management outfit Lexmark, and content/consumer electronics giant Sony – now rely on the Relayware solution, which is targeted at companies with between $250 million and $5 billion in revenue.

Relayware's angle on the market is drawing the interest not only of customers but also of investors. The company in late September announced it has raised $5.5 million from Albion Ventures to expand its U.S. operations. That should carry the company through the end of 2018, at which point it plans to go for a second round. The plan is to grow revenue to $35 million by the end of 2017. Relayware is generating $5 million in annual revenue right now.

"This transaction is the culmination of an extensive amount of research, which identified external social collaboration with indirect channels as a particularly high growth area across many industries," commented Emil Gigov, partner at Albion Ventures. "With the rapid growth in adoption of enterprise collaboration software and the significant benefits to businesses of extending collaboration beyond their enterprise, we believe that Relayware presents a highly attractive investment opportunity."

Relayware CEO Mike Morgan tells CUSTOMER magazine that the company's main competitor is Salesforce. But Relayware is stronger in the area of marketing and program automation, he said. The Salesforce solution is also more expensive, according to Morgan, who says it requires companies to get separate licenses for different partners. Relayware only requires one license from the company, which can then allow channel partners to leverage the solution.

Up until recently Relayware has sold its own solutions direct, but this year and next it will start to ramp up its business development initiative to recruit go-to-market partners including consultancies and marketing services companies that specialize in channel enablement, as well as systems integrators.

"It is definitely a value-added sale," Morgan says. "We don't sell shrink wrapped software."

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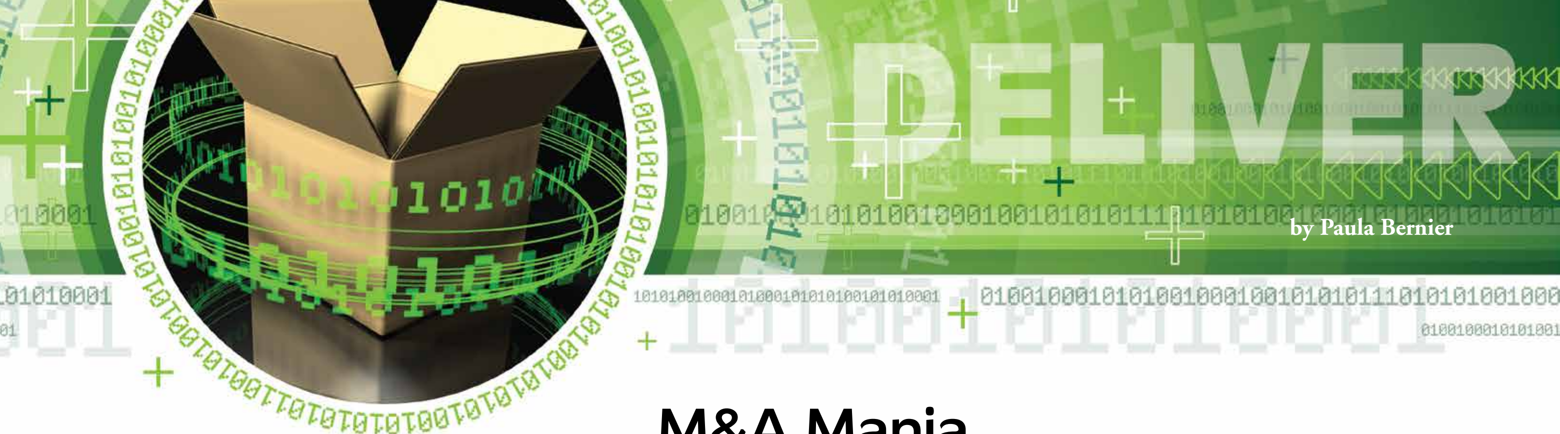

by Paula Bernier

M&A Mania

Leading Customer Experience Companies Expand via Acquisition

It's holiday shopping time. And consumers aren't the only ones opening up their pocketbooks this season. Companies in the customer experience space have also been in on the buying action so they are well stocked with a variety of cloud-based, inbound, outbound, and multichannel solutions as businesses do some shopping of their own.

For example, Five9 in late October announced plans to buy SoCoCare, a social engagement and mobile customer care solution.

"Social media and mobile devices have fundamentally changed customer engagement; consumers are increasingly using social channels and mobile devices to connect with companies for their support needs. With SoCoCare, we've extended our product leadership position by adding best-in-class social and mobile care," said Mike Burkland, president and CEO at Five9.

Genesys announced plans to buy Echopass Corp. for an undisclosed sum. The deal expands the acquirer's position in cloud-based contact centers, as Echopass is the market leader in this space and brings to the table 1,250 new customers, including some blue chip enterprises and federal and state governments. These customers are already on the Genesys multi-channel platform, which Echopass has been using since 2000.

Aspect, Avaya, and Genesys have all made acquisitions this year to bolster their cloud contact center offers.

Genesys in February purchased Angel. Aspect followed suit a few months later, buying IVR outfit Voxeo, Omer Minkara, senior research analyst–contact center for Aberdeen, noted in a recent blog. And just last month Avaya bought a collaborative cloud and content center outfit called ITNavigator, a privately held business out of Israel that Minkara said is a pioneer in cloud, social media, reporting, and management solutions.

Cloud-based customer experience solutions are where the industry is going, Blair Pleasant, an analyst with COMMfusion LLC & UCStrategies.com, told CUSTOMER magazine in the wake of the Genesys-Echopass news.

"It's clear that customers are moving toward the cloud for communication services, including for contact center capabilities," she said. "Cloud solutions make a lot of sense for contact centers – it's easier to add staff and resources for seasonal and cyclical needs, makes it easier to enable at-home or remote workers, etc. Genesys knows that customers are looking for more cloud options, as do all of the other vendors. The question most vendors are dealing with now is how to increase and enhance their cloud offerings."

Dave Rennyson, executive vice president of Genesys Cloud and former CEO of Angel, who is in charge of the company's cloud initiative, told CUSTOMER magazine that Echopass will enable Genesys to better serve the mid and high-end markets. Prior to the Echopass deal, which is expected to close this month, Genesys already played in the high-end cloud space. Genesys had less than 3 percent of the cloud contact center market in North America before the Echopass deal, and following its close will own more than 10 percent of that market, making it the leader in that space.

In addition to Echopass and Angel, Genesys in the past 12 months has acquired SoundBite, which is known for its outbound solutions. Angel, meanwhile, was a leading inbound provider targeting medium and large enterprise customers with inbound IVR solutions and offering mid-market contact center solutions. Genesys is the inbound leader with the pending acquisition of Echopass and No. 2 in outbound with the acquisition of SoundBite.

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“We’ve built a rich fabric of industry leaders in these areas,” says Rennyson.

Yet another cloud-based customer service acquisition announced in October was Nuance’s move to buy Varolii. This union also marries an outbound solutions provider, in this case Varolii, with an inbound one.

Nuance also boasts impressive reach, delivering customer service solutions (including inbound hosted IVR, and virtual assistant solutions for mobile and web applications) to more than 6,500 organizations, including major brands AT&T, Barclay’s Wealth & Investment Management, FedEx, Geico, Telstra, T-Mobile, and USAA.

The Varolii platform is used by many of the world’s largest companies to manage outbound customer service communications via automated phone, e-mail and text messages. The companies said an estimated one out of every five American adults each year is touched by the Varolii platform.

“The combination of Nuance and Varolii not only represents the best of inbound customer service with the best in outbound customer communications, but the opportunity to deliver automated yet natural conversations with customers that are more compelling and effective,” said Robert Weideman, executive vice president and general manager of the enterprise division at Nuance.

Forrester Research surveys indicate that 25 percent of enterprises are considering proactive outbound as a key contact center investment in the next year and that proactive outbound will enjoy excellent growth rates as more and more enterprises adopt it.

The third quarter also saw Oracle buy both BigMachines and Compendium.

BigMachines offers cloud-based solutions that enable sales people to more easily generate quotes and pricing for their customers.

“The fundamental goals of smarter selling are to provide sales teams with the information, access, and insights they need to maximize revenue opportunities and execute on all phases of the sales cycle,” said Thomas Kurian, executive vice president of Oracle Development. “By adding BigMachines’ CPQ Cloud to the Oracle Cloud, companies will be able to drive more revenue and increase customer satisfaction with a seamlessly integrated process across marketing and sales, pricing and quoting, and fulfillment and service.”

Compendium offers cloud-based capabilities that enable companies to more easily create, monitor and promote their mobile and other online content. The tools and individuals from Compendium will be combined with the assets Oracle got through its recent acquisition of Eloqua, another cloud-based marketing automation outfit.

“As customers increasingly access information through online and mobile channels, the buying process is shifting from sales-driven to marketing-driven. Now, more than ever, marketers are challenged to deliver relevant and engaging content across multiple channels and throughout the customer lifecycle,” said Kurian. “By adding Compendium’s content marketing platform to Oracle Eloqua Marketing Cloud, customers will be able to capture more prospects, improve the customer experience and drive top line revenue.”

The 103,000 mid and large sized businesses in the U.S. spend $1.3 million annually collectively on content creation, according to Toby Murdock, CEO of Kapost, which sells a content marketing software and content platform. That means if just 3 percent of that goes to content marketing software, the market opportunity exceeds $4 billion annually.

“When Oracle, the world’s No. 3 software provider, makes an acquisition in a segment, it is a clear sign that the need is clear and growing for that segment,” said Murdock.

Lori Wizdo, principal analyst at Forrester Research, told CUSTOMER magazine that marketing automation – as this space is generally known – is a broad category, but it has to do with managing the pipeline to revenue, which starts with attracting the right kind of traffic, engaging that traffic and converting it to sales. She added that CRM and marketing automation are very closely related. CRM addresses the back end, and the front end had not been automated, but now that’s starting to change, she says. So it’s no surprise that Oracle bought Eloqua or that Salesforce bought ExactTarget, which had purchased Pardot a couple months earlier.

“There will be more consolidation,” she says.

In other related M&A action, BPM and CRM company Pegasystems Inc. in October announced plans to buy Antenna Software, a leader in the Gartner 2013 Magic Quadrant for Mobile Applications Development Platforms.

“Traditional mobile technology can lead to separate channel-specific applications which hamper customer service and efficient operations,” said Alan Trefler, founder and CEO of Pegasystems. “Pega’s distinctive customer-centric approach to mobility enables business users and IT to create optimal customer experiences across channels and devices. We believe that mobile devices should seamlessly operate with processes and cases to drive work to done. Pega and Antenna coming together offers our collective clients state-of-the-art mobile development, responsive UIs, device management and cloud-based Backend-as-a-Service.”

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by Jonathan Pinto

Five Steps to Improve Webchat at Your Company

If customers visit your business's website and don't get the help they need, you run the risk of losing them forever. A survey found that 45 percent of customers will leave your site for a competitor, and an equal percentage will be less likely to visit again. Four out of 10 visitors will be less likely to buy online, according to the survey data from Jupiter Research, a Forrester Research company. Customers expect proactive help from a website's customer service tools, whether they're making a purchase, solving a billing dispute or looking for technical assistance.

To meet the need for fast, personal help, more and more companies are turning to webchat. Webchat can improve the customer experience while increasing self-help adoption. It can help increase revenue and lower costs, deflect e-mail and voice contacts by double digits, and substantially raise first contact resolution.

Customers are embracing it, too. In just three years, from 2009 to 2012, customer acceptance of webchat jumped from just 45 percent to 68 percent, according to a survey by BoldChat, a live chat software provider.

Whether companies have a webchat program in place but feel it's not living up to its potential or they're thinking of starting one, the five steps that follow can help ensure that webchat is an asset and not a stumbling block for businesses and their customers.

Identify baseline performance, goals and success metrics

For companies embarking on webchat and those who want to improve performance, it's critical to establish a baseline and define goals and metrics. The metrics that drive performance on traditional channels are different from those that measure webchat performance. Deflection from other channels is the primary measure of success. Other important metrics include customer satisfaction, incremental sales or any other criteria that makes sense for a particular business.

Improve the customer journey and change behavior

A webchat system that works well helps improve the customer journey. Companies need to assess whether they've made self-service channels easy to find, simple to use and inviting. If the chat option is poorly deployed, it will aggravate customers and drive them to another channel or even a competitor.

Every contact through voice and e-mail channels is also an opportunity to educate customers about the webchat option. For example, a call center representative might resolve a billing question on a particular occasion but also work to change customers' future behavior by telling them about the chat option and how it can be used.

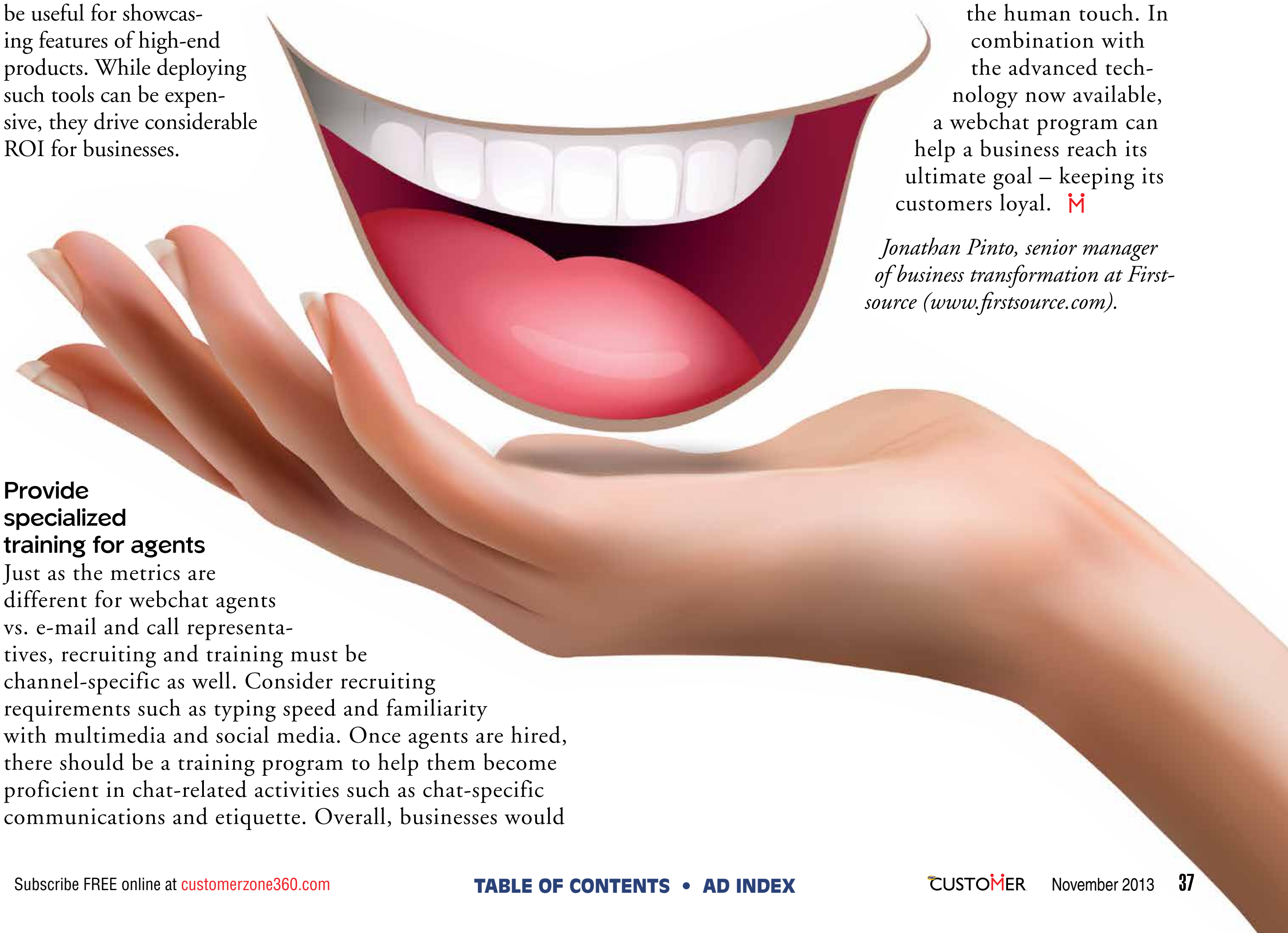
Look for broad technology capabilities

Having multifunctional technology in place can ensure that a webchat system is being used to its full capacity.

One important technology feature is the ability to segment customers. Not all customers can be helped with webchat, and segmenting avoids lost time and frustration for the chat agent and the customer. A webchat channel should ideally be rules-based so it is offered when certain conditions are met, helping to avoid unnecessary volumes.

Analytics to glean customer insights are one of webchat's most useful features. For example, when a new product is launched, contact centers can create alerts that capture customers' reactions about pricing and features, and offer early warnings about dissatisfaction that could lead to churn. This information can guide management in changing course, if necessary, and making better decisions in the future.

To be most useful and customer-friendly, webchat programs should have multimedia capabilities. A video link, for example, could provide a customer with a step-by-step, easily understood guide to setting up technology devices such as broadband. A video chat would be useful for showcasing features of high-end products. While deploying such tools can be expensive, they drive considerable ROI for businesses.



Provide specialized training for agents

Just as the metrics are different for webchat agents vs. e-mail and call representatives, recruiting and training must be channel-specific as well. Consider recruiting requirements such as typing speed and familiarity with multimedia and social media. Once agents are hired, there should be a training program to help them become proficient in chat-related activities such as chat-specific communications and etiquette. Overall, businesses would be wise to create a best-practices roadmap that spans the agent lifecycle.

Evaluate regularly and make improvements

It's not uncommon for businesses to buy and implement a webchat system and then fail to take critical actions like evaluating its effectiveness, measuring ROI and improving functionalities. In some cases, businesses may have decided their webchat is unsuccessful because they don't have the knowledge or tools needed to measure ROI, or the system may have key – but correctible – lapses that aren't being addressed. Surveying customers about their experience can be very revealing in terms of surfacing pain points.

Webchat can be used broadly across the customer servicing spectrum and a wide range of industries, including telecommunications, media, retail, financial services and utilities, among others. It has clear benefits for businesses and customers. At the heart of a successful webchat program, however, is the human touch. In combination with the advanced technology now available, a webchat program can help a business reach its ultimate goal – keeping its customers loyal.

Jonathan Pinto, senior manager of business transformation at Firstsource (www.firstsource.com).

by Elad Katav

Unify & Conquer

The Bottom Line on One Line of Support

The trend in customer service over the last 10 to 15 years has been to divide up work, creating multiple support tiers and putting more technology in front of the customer to route customer communications and manage the volume – all to better serve company needs.

A few weeks ago I interviewed a very talented candidate for an open position in my group. After a long session he asked me if our team handles the first level of support. I told him the way we run the show is that the same team does first, second and third levels of support, they do training, they do remote service and they do onsite service. The candidate looked at me, said, "I like everything you said except first level support – not me" and left. So, not only have companies created a convoluted system of communication for customer service, but they have also added a cultural manifesto: The higher level of support that you are a part of, the better you are – the more you get compensated, the better professional you are and even the more well-respected you are. Feudalism at its finest!

> **Your experts should handle the smaller issues in addition to the larger ones – smart, talented reps hate to answer the same question twice.**

Let's try to imagine a different customer service product, one that actually serves the customer and not the company, with only one level of support that can manage every ticket end to end. A single state of the art level of support can reduce the time to resolve issues, solve more problems per day, create a wow effect, establish trust, build a stronger brand and even make your product better. With just one level of support, your smartest reps solve all problems. They are the experts, providing first, second and third levels of support as well as training for new users of the product.

Traditional support models advocate cost cutting and argue that by adding additional support layers they free up the experts to work on only the harder technical issues (20 percent), while low-level tech support can manage the small tickets (80 percent).

In reality your experts should handle the smaller issues in addition to the larger ones – smart, talented reps hate to answer the same question twice. Instead, they'll fix the problem by talking to the product manager, write a small app that works around the problem or, better yet, provide R&D with the root cause analysis and save development. As a result, you'll receive fewer calls about trivial issues, which in turn saves you time and money.

The only true challenge with this model, therefore, is finding the right people to bring on board to your company. This is a very unique position, and when I describe it to recruiters they usually say that this role doesn't exist in their system. But this is the same problem that every organization faces for every position – it is not an excuse to avoid upgrading your customer service product. Having an awesome team makes it easier to recruit awesome people.

How do I know this system works? I use it myself.

I remember 18 years ago when I got promoted to the second level I was really proud, feeling like I was joining the premier league. It was only when I was promoted to the third level that I realized something was wrong. When I got the head of operation position and had to run this mess, I said: "No more!"

So nowadays, our entire communication process, from downloading the product through opening a ticket, is all part of one line of support. Our customers thank us, our employees are proud to provide this kind of service, and our bottom line reaps the benefit.

Elad Katav is COO of Correlsense (www.correlsense.com).

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by Kevin Smith

Spirits Company Beam Turns Up the Heat

Beam Inc. has a 218-year history of making spirits, with premium brands such as Jim Beam Black and Maker's Mark bourbon, Laphroaig scotch and Sauza tequila. Beam blends its rich heritage with the vigor of a startup. It has distilled its strategy for long-term, profitable growth into efficiency and best practices such as lean manufacturing, global procurement and global shared services. It's proving to be a successful recipe for growth and innovation. Beam had $2.5 billion in net sales in 2012, its first full year as a pure-play spirits company.

A Formula for Shared Services

As part of its efficiency and best practices strategy, Beam created the Global Business Services group to provide human resources and financial transactional activities from a central hub in Louisville, Ky. The GBS is the primary point of contact for benefits, compensation, accounts payable, accounts receivable and other core business processes for Beam employees, customers and suppliers in North America, and the company plans to open additional GBS locations in Spain and Asia Pacific.

"With shared services, Beam can drive process efficiencies, ensure standardization and maximize service quality across its global operations," says Susan Klein, senior director of the project management office at Beam. "We needed a shared service platform to use throughout the organization and across business functions."

Business Value in the Cloud

Beam has used FrontRange's on-premises HEAT Help Desk since 2003. More than 12 departments use the solution. So when the Global Business Services group began looking for a solution to support service management, it took a close look at FrontRange HEAT Cloud Service Management.

"I really liked the usability we have experienced with FrontRange's Help Desk solution," says Klein. "Great usability on a highly scalable, cloud-based platform swayed me to stay with FrontRange and migrate to HEAT Cloud."

The flexibility and adaptability of the HEAT Cloud Platform was a natural fit with Beam's application standardization and globalization objectives, and Beam migrated from the on-premises HEAT Help Desk to HEAT Cloud Service Management in late 2012.

HEAT Cloud Service Management is a highly extensible and configurable solution with an integrated workflow-based application platform that provides a single, consolidated view of information that's relevant to Beam's different locations, departments and users. Beam leverages the same workflow platform for human resources and financial transactions – incorporating other shared service workflows as the business demands. Workflows can be straightforward or highly customized to Beam's processes.

"HEAT Cloud is an essential enabler for our GBS," says Julie Commons, IT manager, support services at Beam. "HEAT Cloud is critical in our day-to-day operations and has increased the agility of our business to achieve shared services and greater efficiency."

In addition to usability and flexibility of the cloud-based HEAT solution, Beam no longer needs to worry about upgrading, maintaining and supporting on-premises software. The cloud has enabled Beam to realize both capital and operational expense savings by eliminating the need for multiple servers.

"Previously, I was the only person supporting HEAT, and now I hardly spend any time at all on support," says Commons.

Commons adds that she hasn't needed much interaction with FrontRange support since the move to the cloud, but the overall experience has been positive.

Smooth Move to the Cloud

Beam has seen a rapid time-to-benefit with HEAT Cloud. The GBS processes an average of 4,472 tickets per month.

The move to the cloud was smooth, and integration between HEAT Cloud and Beam's enterprise applications was straightforward.

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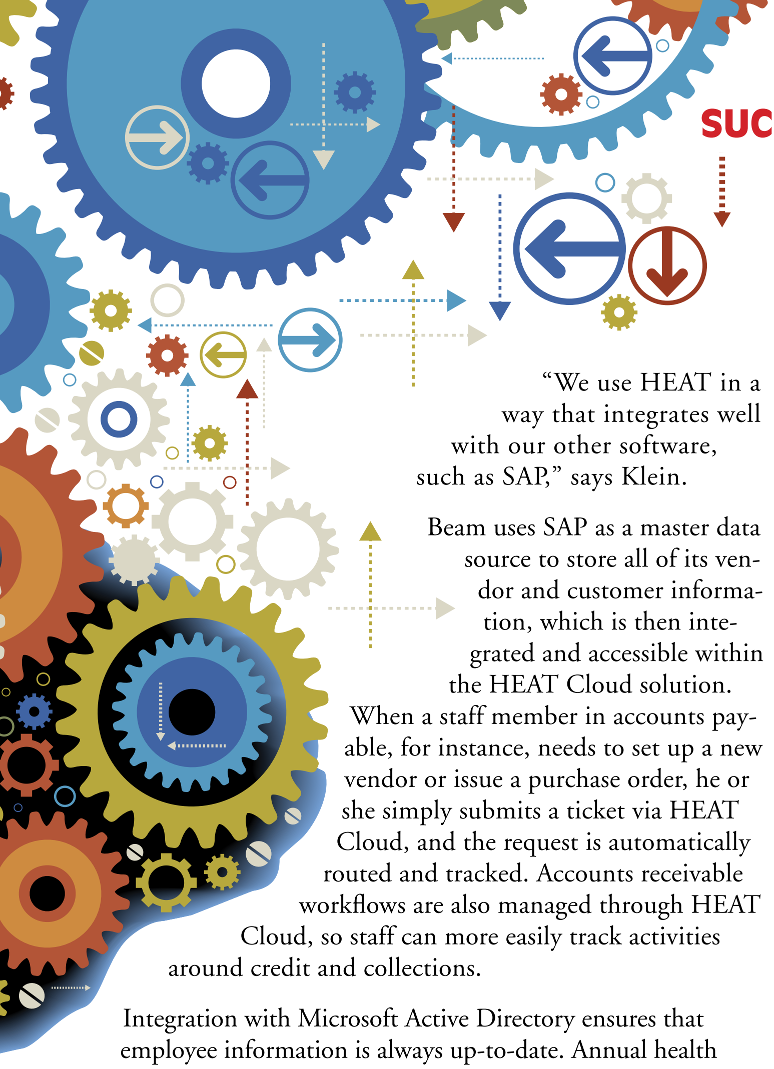

"We use HEAT in a way that integrates well with our other software, such as SAP," says Klein.

Beam uses SAP as a master data source to store all of its vendor and customer information, which is then integrated and accessible within the HEAT Cloud solution. When a staff member in accounts payable, for instance, needs to set up a new vendor or issue a purchase order, he or she simply submits a ticket via HEAT Cloud, and the request is automatically routed and tracked. Accounts receivable workflows are also managed through HEAT Cloud, so staff can more easily track activities around credit and collections.

Integration with Microsoft Active Directory ensures that employee information is always up-to-date. Annual health care enrollment is handled through HEAT Cloud, as are reimbursements, such as when an employee purchases Beam's products at a store or restaurant.

Positive User Experience

More than 50 employees in the Louisville Global Business Services use HEAT Cloud and reaction has been positive.

"The migration activity and learning curve was simple, simple, simple," says Commons.

HEAT Cloud comes with numerous out-of-the-box service management dashboards and reports, and Beam has also configured its own dashboards with an easy-to-use design module.

"It's incredible how quickly people have become dependent on reporting and tracking activity through HEAT," says Commons.

The company tracks metrics such as the time it takes to bring on a new hire or process a purchase order through HEAT Cloud and utilizes key performance indicator reports to help drive steering committee decisions every month.

Next Steps

With the smooth transition of moving finance and human resources to HEAT Cloud complete, Beam is already planning its next steps. First up is tighter integration with SAP.

"Some of our business processes are more detailed, so we'll leverage the HEAT's quick actions and workflow designer to extend our integration with SAP, so that we can provide notifications to employees based on certain actions," says Commons.

As with many companies, mobile devices are playing a bigger role in the workflow at Beam, and with mobile support in HEAT Cloud, employees will be able to submit tickets and check status for their requests from Apple iPad and iPhone mobile devices.

Kevin Smith is vice president and general manager of the cloud business unit at FrontRange (www.frontrange.com).

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Bookseller Puts CSRs on Tap

Amazon.com has been an innovator on many fronts. One of its most recent innovations is in the area of customer service, specifically, making it super easy for Kindle users. The company has done that by designing a button into the Kindle Fire HDX so users can click it to instantly initiate a live video interaction with a customer service representative. The service is free and the aim is to make the connection in 15 seconds or less.

Twitter Flies Direct

Twitter is reportedly working on an effort to enable users of the social media service to send messages direct to one another, assuming the person on the receiving end opts in to receive direct messages from the sender. This appears to be an appeal to advertising types or anyone trying to sell anything.

Contact Solutions Goes Mobile

Cloud-based self-service provider Contact Solutions is addressing the mobile boom with the introduction of My:Time. It includes a cloud-based mobile platform, agent desktop portal, and mobile apps for iOS and Android. According to a recent Contact Solutions survey on mobile users and customer care, 92 percent of consumers want more mobile customer service options.

Shoppers Seek to Save

U.S. consumers intend to spend an average of $646 on gifts this holiday season, which would represent an 11 percent increase over the $582 they planned to spend, on average, in 2012, according to Accenture's annual holiday shopping survey. One in five consumers plans to spend more on gifts this year, compared to 14 percent who planned to increase their holiday spending in 2012. However, 94 percent said that discounts will be important to their purchasing decisions this holiday season, up from 84 percent in 2012, and 49 percent expect that three-quarters or more of their purchases will be for discounted or sale items.

CallCopy Rebrands Up

The workforce optimization solutions company formerly known as CallCopy henceforth shall be called Uptivity. That was the pronouncement at its Connect 13 user conference this fall in Columbus, Ohio.

Interactive Intelligence Launches Content Management

A new capability called Interaction Content Manager captures, indexes, stores, searches, accesses and manages content with the goal of helping organizations reduce costs, increase employee productivity, and improve customer service by enabling the right content to be available at the right time. Targeted at mid-size to large contact centers and enterprises, ICM is expected to be generally available worldwide in English in the fourth quarter, with additional languages to follow in the first half of 2014.

Securing Call Center Payments

Semafone has announced a partnership with voice and data communications specialist, Gamma, to provide a fully hosted secure payments solution for contact centers. Using Semafone's technology, customers are able to make a payment using their telephone keypad to transmit credit card data directly to the bank, so no sensitive details are held in the contact center's infrastructure. Card numbers are not spoken aloud and individual key tones are masked by the Semafone application so that they cannot be recognized by their sound. Throughout the transaction the contact center agent can neither hear nor see sensitive card information, but remains on the call to deliver customer service.

What's in Store for AT&T

AT&T has been investing in customer experience, and it seems to be paying off, the company tells CUSTOMER magazine. The service provider recently received a top customer service ranking from J.D. Power. The carrier also is taking a queue from its partner Apple and expending more thought and resources on AT&T retail locations. The first of the reimagined stores is in LaGrange, Ill.

Marketing Automation Gets a New One

The marketing automation space is hot. One of the latest solutions to join the fray is iMarket360 from Infogroup Targeting Solutions. It's described as a multi-channel, integrated marketing tool that's used to analyze, track and customize multiple campaigns through a single, cloud-based platform.

HP Creates CE Ecosystem

HP has announced core portfolio partners Critical Mass, Cynergy, DigitasLBi, Organic and projekt202, which will offer integrated solutions on a global scale using HP's products and services in combination with their own offerings to help customers build user-centric applications that connect to complex back-end systems and improve the customer experience. Critical Mass addresses the Cumulative Customer Experience by connecting the dots across brand channels, mobile devices, marketing messages and touch points so the customer doesn't have to. Cynergy offers expertise in digital strategy, design, development and delivery. DigitasLBi is a global marketing and technology agency. Organic bills itself as the world's first Internet-based agency and serves such clients as Hilton Worldwide, Kimberly Clark, Pepsi, Procter & Gamble and Visa. projekt202 is a services firm that "creates emotionally rich and intuitive solutions that enable customers and end users to access the full potential of technology."

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Within a unified communications framework, integrating CIC with Microsoft Lync brings the contact center to life. Organizations using Lync and CIC enhance contact center and customer care processes across media channels of all types — voice, email, chat, SMS, fax, and even social media. The integration's expanded collaboration features for IM, real-time presence, intelligent interaction routing, transfers, and reporting also bring contact center agents and enterprise users together more tightly, bridging gaps in collaboration across the organization.

The result is a customer experience free of barriers, from the communications channels customers choose to routing customers to the "right" employees with speed and precision — and without frustration.

Collaboration and first contact resolution

FCR has become the benchmark of the customer experience, and of building customer loyalty. Emanating from the contact center, FCR often requires agents to assemble a "team" right away to resolve the customer's issue quickly. That is, agents must be able to locate and connect with enterprise users and subject matter experts (SMEs) on demand, via the best media channel available to all parties, including the customer. Collaboration for FCR therefore can mean having to bring workers together throughout the organization, even when employees work from remote locations.

With CIC and Microsoft Lync working in unison, organizations connect customers with the right resources quickly and avoid blind transfers and lengthy wait times. Agents and enterprise users alike have multiple media and collaboration channels to choose from, and instantly know the availability of other users. As importantly, customers can count on having their issues resolved at first contact on a consistent and reliable basis. In customer service terms, average interaction times decrease, FCR rates increase, and the customer gets their issue taken care of accurately and much faster.

The customer experience at its finest

For customer experience quality, contact centers have long realized that live customer-agent interactions must be resolved swiftly. It's what most customers demand. FCR rates help pinpoint concerns in the interaction process to ensure that customer issues are indeed handled and resolved in rapid fashion. After all, no customer wants to be transferred aimlessly from one person or department to another when they have an issue — and asked repeatedly to provide their account information and explain their issue at each stop. Nor do customers want to be put on hold for extended periods because an agent can't find the right information or subject matter expert to answer a question.

Customers want a quick and accurate resolution at the first point of contact they come to, no matter the communication channel. By eliminating organizational silos, the Microsoft Lync platform and unified communications are a strong first step in this direction. But taking the next step is considerably more critical — integrating Lync with the multichannel CIC contact center software.

With the levels of interoperability this integration provides, businesses are able to bring together their contact center and enterprise to enhance customer care across media channels of all types, across the business. To close organizational gaps, the Microsoft Lync-CIC integration improves presence visibility, real-time collaboration, and information flows between contact center agents and subject matter experts throughout the enterprise. These users even get a single click to multiple collaboration channels for IM, video, voice call, email, fax, and desktop sharing — a crucial multichannel consideration for improving the customer experience… and customer loyalty.

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Love/Hate with IVR

IVRs – you either hate them or you hate them. At least that's been the case for most people most of the time. I moderated a webinar earlier this week about modern uses for IVR systems and got to thinking about why businesses have been so poor at creating good IVRs (and so adept at making customers avoid them like the plague).

Irv Shapiro, CEO at ifbyphone, made one observation, that most IVRs have been deployed with cost savings in mind. That seemed to be more tolerable than today – perhaps even acceptable for many, as their world wasn't as mobile or connected as it is today. Of course, intolerance is part of this new digital, instant gratification world where users are much more fickle than ever.

That said, I noted during the webinar that it feels as though businesses have designed IVRs absent of any real consideration of the user – the customer, that is.

The most frustrating feature, of course, is the IVR's capacity for requesting account information, and the agent's need to ask for it again once you are connected – that is, if you are able to reach an actual agent, considering the most annoying feature of most IVRs is the lack of instruction on how to get from Mr. Roboto to a live agent. So, you push button after button, which sometimes works, but other times sends the IVR into what seems like an endless tailspin as penance for entering an incorrect response.

Moving to the end of the interaction, there are those incessant post-call surveys, but you never know how long they are and weren't given the option to opt out. In fact, you often aren't even notified of their existence, which likely reduces response rates even more, as customers hang up quickly. Similarly, after calling your issuing bank and activating a new credit card, you have the pleasure of listening to a seemingly endless list of offers that you can't opt out of – but you also aren't sure if hanging up before the system tells you it's OK to will cause your card to not become activated.

What's my point? As I listened to the webinar, entitled, "9 New Ways to Use IVR to Improve Your Marketing, Sales, and Support," I really started to wonder why more businesses fail in their IVR implementations. There are several cases where businesses I've dealt with have successfully leveraged IVR to make my life as a customer easier and more pleasant – in other words, they leverage technology to deliver a better experience.

One was a cable operator which, as it turns out, has to send a signal to new boxes once they have been installed in order to activate them. Until recently, that had to be done by waiting on hold, sometimes for excruciatingly long periods of time, to have an agent effectively push a button. Talk about endless frustration with a service category with which customers are inherently dissatisfied to begin with. Alas, the provider has since created a reasonably easy to navigate IVR that allows customers to manage this process without any waiting. It's still not clear how to get out of the system to a live agent, but it's a start.

Another vendor I've used found a way of collecting experience data without being intrusive or annoying at all. In fact, its approach actually made me want to provide feedback. Why? I was told what, why, and how long the experience would be – and not by an automated system.

The bottom line really is that IVR has gotten a bad rap – perhaps rightfully so – but the slap on the hands should go to those individuals implementing the systems. As with any technology, success rests with proper deployment and usage. Be creative, be smart, and be customer-focused with your IVR, and you will find much more interaction with your customers and a parallel increase in satisfaction levels. And check out the webinar archive to hear some of the neat ways businesses are leveraging IVR today (www.tmcnet.com/webinar).

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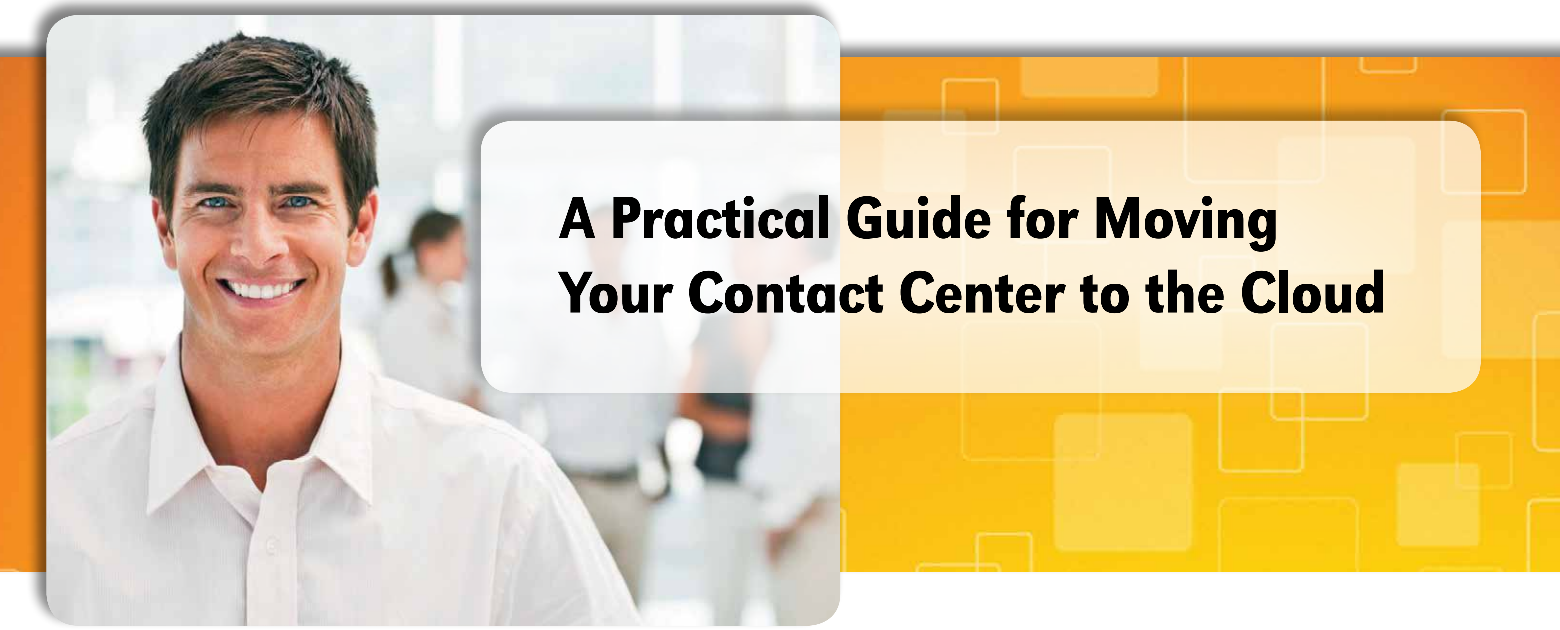

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Making the Leap
Taking your Call Center to the Cloud

Proactive: The Next Wave in Business to Consumer Communications

By Rory J. Thompson

If you manage or work in a call center, you're aware that customer frustration is one of the biggest challenges you face. In this "me-oriented" generation, customers want answers, and they want them fast. If they've taken the time to reach out to your contact center, they have a problem or issue that they want handled quickly and correctly, so that they can get on with their lives.

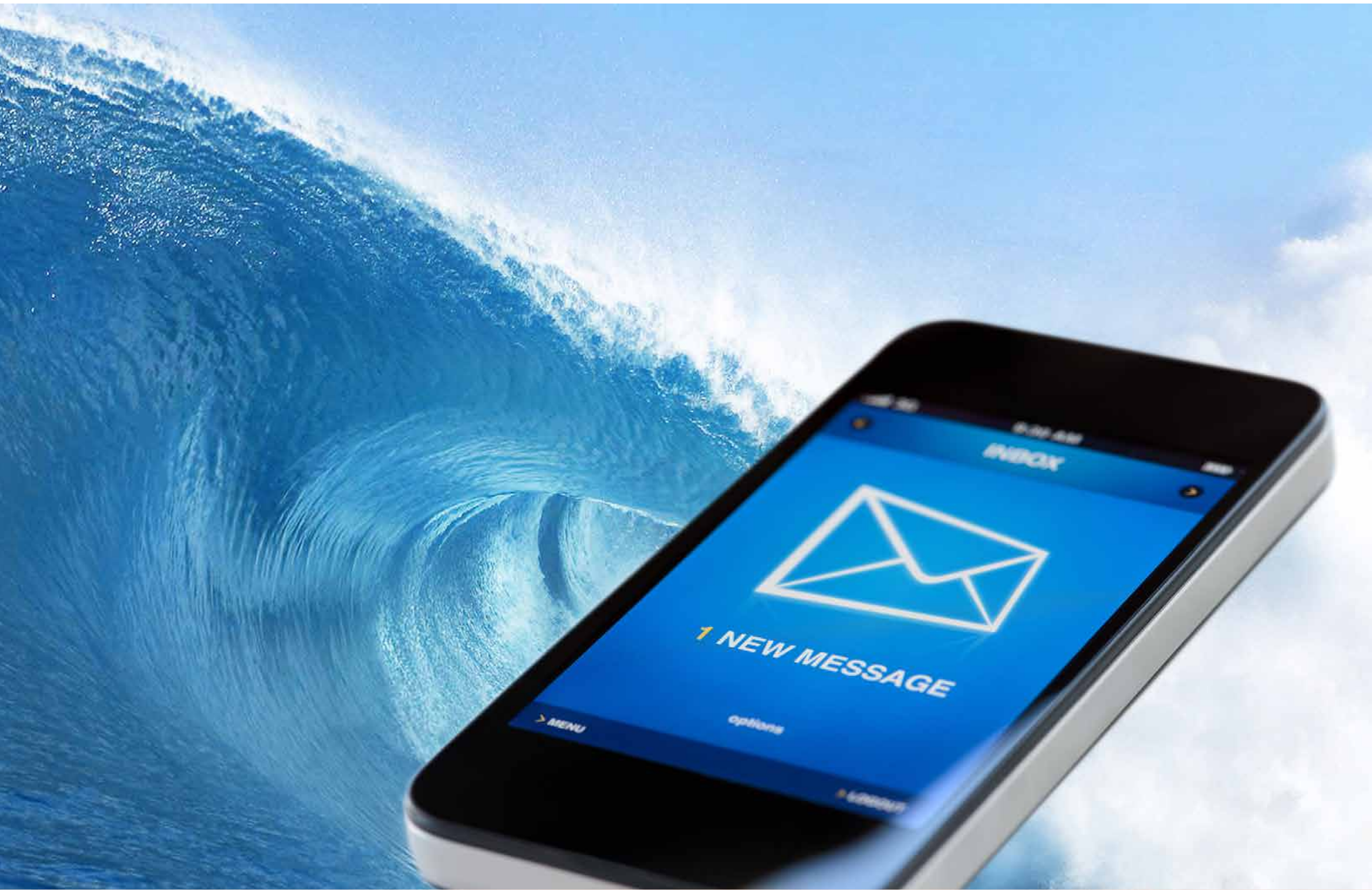
But even the best-managed call centers can only do so much. Highly trained reps can best handle one caller at a time, and those in the queue grow more frustrated with each passing second.

Fortunately, there is a new way to handle customers where they can feel like they have more control, can get their answers more quickly, and get their problem or issue resolved faster than by just sitting in a queue, listening to static-y music. The answer is Interactive Text Messaging (ITM) via Genesys | SoundBite Communications.

Pioneered and perfected by Genesys | SoundBite, ITM is exactly what it sounds like: Texting message conversations, where customers can interact with qualified representatives at your call center, in a mode they're most comfortable with -- Text Messaging (SMS).

Did you know that SMS messaging is the fastest growing communications channel in history? More than half of the global population is a mobile phone subscriber and over a billion text messages are sent per minute worldwide – that's over 275,000 per second. SMS messaging has become the preferred communications channel for millions of consumers due to its convenience, immediacy, and ease-of-use. So it stands to reason that businesses that leverage text messaging for customer communications are being rewarded with improved response rates. Industry reports that over 90 percent of text messages are opened – the majority within three minutes.

In today's multi-channel world, contact centers must provide the same level of customer service through SMS messaging as they do for voice calls and even Web chat. Providing agents with the necessary tools to interact and engage



with consumers over mobile incorporating voice and text messaging is central to the customer experience and overall productivity of your contact center. Genesys | SoundBite enhances agent productivity through its easy-to-use Web-based user interface. It's a win-win for everyone.

Many contact centers have taken the first step in supporting SMS messaging by enabling automated text dialogs with customers. Although automated text messaging is beneficial to both consumers and businesses, it is only one small step. Some messages cannot be resolved in an automated fashion and should be handled by trained contact center agents in real time. Genesys | SoundBite cloud platform, enables agents to view and respond to customer text messages through an easy-to-use Web interface.

Text/SMS conversations can transition seamlessly from automation to agent or vice versa, and texts that require special handling can be automatically escalated to live agents, cross channels and calling the customer in real time. Best of all, supervisors can configure individual agent permissions and monitor agent activity for quality assurance during the whole process.

Among the highlights of Interactive Text Messaging on this platform, contact center agents can:

- View the history of a specific mobile SMS conversation and access a customer's previous text conversations;
- Send pre-defined or free-form text messages to customers in a single conversation;
- Opt-in or opt-out a customer from future texts or suppress them from future communications;
- Decide to "not reply" because the message is junk or inappropriate;
- Handle multiple customer text message dialogs simultaneously.

That last point is important, because it allows agents to deal with multiple customers at the same time, thereby cutting their wait time and lowering frustration levels. Because texts take time to compose and send, a good call center agent can juggle several at once, while maintaining professionalism and speed. The end result is a satisfied customer with shorter wait times.

How Does It Work?

The Genesys | SoundBite platform enables organizations to interact with customers via text in a variety of ways, including fully-automated two-way text campaigns as well as strategies with optional agent involvement. Genesys | SoundBite simplifies compliance efforts by validating mobile numbers, automating mobile consent, managing opt-in/opt-out requests, controlling contact attempts, matching time zones, and sending messages only during safe contact windows.

Further, their cloud-based Contact Center Text Messaging solution brings the benefits of text messaging into contact center operations by enabling organizations to further use text to communicate with their customers using a combination of automated and agent-assisted interactive text dialogs. Using its Agent Text Portal, Genesys | SoundBite also provides the ability to escalate SMS chats that require special handling to live phone agents when needed.

Genesys | SoundBite delivers a breadth of text messaging capabilities, including the broadest Free-to-End-User (FTEU) text messaging coverage in the industry at 95 percent across the five largest telco carriers, as well as global SMS delivery in the appropriate language and character set. Other supported text capabilities include message pacing, long codes, dedicated and shared short codes, short code pooling, and text analytics to help better understand your customers.

Choices, Choices

Let's say a consumer sends a text message to either initiate an interaction with a company or to respond to a message sent to them by an organization. For example, the customer receives a communication from a company via SMS message or other communications channel, such as outbound interactive voice recording email, or letter. Rather than being instructed to call the company, he or she is prompted to send a text using the provided keyword and short code. The customer sends the text message and the Genesys | SoundBite platform reviews the communication using a set of predefined business rules and logic, and the dialog begins.

Their platform then enables customer self-service and automated issue resolution using two-way text messaging. It reviews incoming texts using enhanced keyword search and "intelligent decisioning logic", business rules and message processing to facilitate the appropriate response, resulting in a number of customer inquiries being resolved without agent intervention. The automated solution responds with a personalized text message with no agent intervention. Optionally, business rules can dictate that certain messages are escalated to an agent for text or voice follow-up. Authentication and right-party verification are built into the system, as is support for automatic opt-outs.

As might be expected, some SMS messages cannot be resolved in an automated fashion, and should be handled by contact center agents. Inbound texts that the platform determines need the involvement of an agent are routed to the Agent Text Portal for agents to access via their inbox. Agents can view a customer's text message conversation history and can send a pre-defined response or write a free-form text back to the customer. Agents can also simultaneously support text chats with multiple consumers, and text dialogs can transition seamlessly from automation to agent and vice-versa, depending on the consumer's most recent response. Supervisors can configure agent permissions and monitor communications for quality assurance.

In short, new options exist for agents to interact with customers more quickly and more completely than ever before. We all have this technology available to us, so it makes sense to incorporate it into our business. With tech-savvy customers knowledgeable about mobile SMS messaging and comfortable with it, it makes sense to speak to them in the language and via the channel they want. The result is happier customers and lowered frustration.

Put the Customer First... And Grow!

By Paula Bernier

A lot of folks compare contacting a call center to going to the dentist; you might have to, the problem's not going to get any better if you don't, but you really don't want to.

And while literally millions of people wrestle with that decision every day, a great number of call center and customer experience managers aren't doing anything to alleviate customers' concerns and distress. Yet with just a little tweaking and adding of some intelligent options, a call center can be turned from a place of dread for callers to an actual recruiting tool to build business, brand loyalty and goodwill.

One of the main problems is inconsistency; nothing is worse for a brand than an inconsistent customer experience. Whether a business is engaging with their customers via the Web, SMS, mobile, social media, or over the phone, it is the seamless interplay among all channels that create the optimal customer experience. And nothing sets a brand apart than one that knows how to handle them well, particularly an inbound phone call.

Think about it: how many times have you called a contact center, and heard the same boring "our options have changed" message, then had to listen to endless options yourself? Frustrating, right? Well, there is a solution.

Genesys | Angel Inbound Interactive Voice Response (IVR) solution enable organizations to more efficiently and cost-effectively deliver a high quality customer experience (CX). Their award-winning speech technology ensures professional and interactive communications with your customers to facilitate both self-service and quick resolution of issues. Isn't that what you're hoping to accomplish with every call?

Built on a flexible cloud-based platform, Genesys | Angel's Inbound IVR application can be up and running quickly, no matter the size of the call center and volume of calls. It's fully equipped to scale and can iteratively improve with changing business and customer needs.

From voice recording to detailed reporting and analytics, Genesys | Angel's Inbound IVR incorporates all the features you'd want from a world-class solution.

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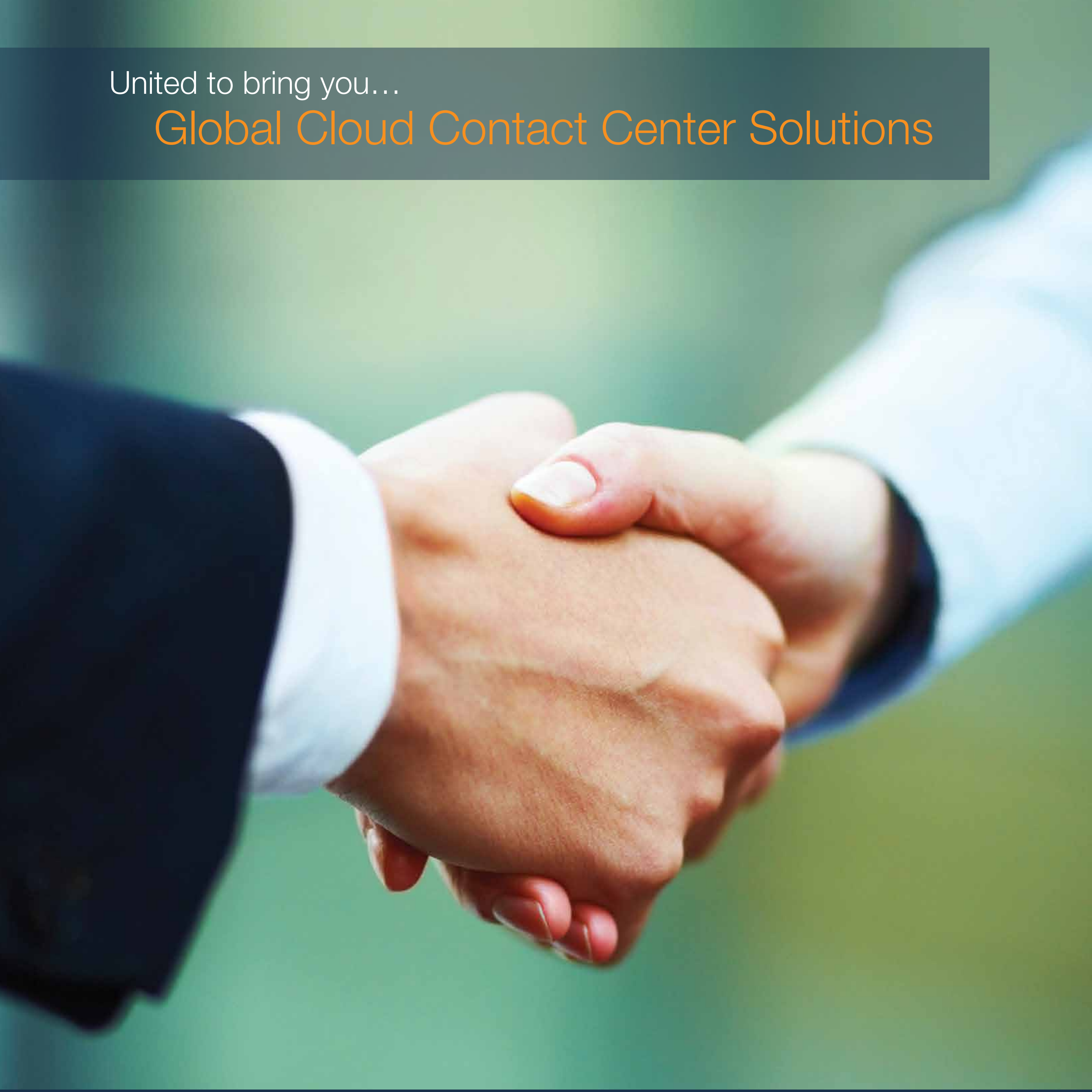

The Genesys | Angel Saas Platform gives your business:

- Fast and flexible IVR and contact center solutions to meet your unique needs.
- An open, configurable and scalable cloud-based platform.
- On-demand business intelligence and caller analytics.
- True multi-channel communications including SMS, mobile, chat, and more!

Discover More about the robust Genesys | Angel SaaS offering:
angel.com | 1.888.MyAngel

Genesys | Angel

With Genesys |Angel's Inbound IVR solution, you can:

- Design a CX First Inbound IVR conversational flow;
- Automate routine processes through your IVR;
- Personalize the IVR customer experience with CRM integrations;
- Capture customer data through your IVR;
- Analyze IVR call data for iterative improvements;
- Follow-up an Inbound call with an Outbound Communication.

But before you make such a commitment, it's important to look at the other side of the coin, from the customer's point of view.

From a recent whitepaper by Genesys | Angel, here are a few things every caller wishes you knew about them:

Anticipate Their Needs:

Knowing why your callers might be on the line—and addressing those needs up front—is instrumental to effective self-service automation. A customer can't self-serve if they can't get to the option they need. If agent support is required, it defeats the purpose of automation. A system based on best practice Voice User Interface (VUI) design can go a long way here. But some IVR systems have been constrained by their own on-premise infrastructure and technology. Today's IVR lives in the cloud and is powered by technology, not constricted by it.

Make It Easy for Them:

While the ability to test and tune IVR applications is instrumental to the success of IVR self-service, it doesn't stand up without Business Intelligence (BI)—intelligent insight into the performance of your voice applications. Even if a system appears to be functioning as planned, and even if it is tested regularly, customer experience excellence is a shot in the dark without intelligent analysis of IVR application data. When BI is woven into your IVR, it allows you to see how the system is functioning.

Treat Them Well:

All callers want to be treated with respect—to be spoken to in a respectful manner, to be heard, empowered, and taken to their destination efficiently. Being asked repeatedly for the same information, bumping around in voice menus or having responses ignored can make an existing customer feel disrespected, and can lose a prospective customer. Treating IVR callers with respect requires a combination of personalization and effective technology. If a caller achieves the desired result fast, they feel valued, they return, and they recommend you to others.

Woo Them:

There is tremendous opportunity for companies to use automated self-service IVR as a key differentiator. At a time when customers are accustomed to clunky, ineffective IVR, a truly personalized, helpful experience will set your company apart. Callers see IVR as part of a company and extension of its brand—not a disparate communications vehicle. If you choose a solution that offers the essential components of phone IVR self-service mentioned here, and support the communication methods of their choice (voice, mobile , web, SMS), you can simultaneously boost customer satisfaction and cut costs.

So, What Now?

An automated IVR system is a major touchpoint for your company's end users. It conveys as much about your brand experience and selling proposition as any advertising and marketing campaign. Rather than limit IVR design to business owners and executives, you should involve call center representatives and marketing managers. These customer-facing employees will lend invaluable insight into what your end users will find most helpful.

Even the most carefully-crafted, expertly-designed IVR system will fall flat if little annoyances impede the user experience. For example, consider carefully the persona with whom users will interact throughout a call. Your system's persona should be easy to understand, consistent throughout the entire call and free of annoyances that turn users off, such as over-produced or phony-sounding voices.

Recovery strategies are another area that can make or break an IVR system. Keep in mind that, ideally, users will liken their IVR experience to having a conversation. When people don't understand each other, they ask questions or rephrase statements to keep the conversation moving. Your IVR interface should employ similar conversational strategies to keep users confident and engaged when misunderstandings occur.

A properly run call center can be a huge asset to any organization. Think of it as the front door to your company. If you greet your guests with open arms and make them feel welcomed and appreciated, they're sure to come back for more. That's the true definition of success.

One of the main problems is inconsistency; nothing is worse for a brand than an inconsistent customer experience.

The Minefield Known as Mobile Marketing

By Rory J. Thompson

Years ago, when asked why he robbed banks, infamous stickup man Willie Sutton allegedly replied, “Because that’s where the money is.”

We’ve come a long way since then, yet Sutton’s misguided logic makes a certain kind of sense in today’s business world, albeit with a twist: marketers need to go where the customers are. And these days, more and more of them are on the go with mobile devices.

Yet with all the rules and regulations in place about targeting mobile devices with your message, you need to tread carefully lest your company run afoul of the law and risk alienating the very people you’re trying to connect with.

Hence, permission-based, or opt-in, communications has become the standard for business-to-consumer interactions, driven jointly by the desire to grow a base of loyal customers, engage them with compelling cross-channel interactions, and to comply with today’s tightening regulatory environment.

Permission-based communications are highly valued by organizations, across all industries, looking to grow and retain loyal customers, yet many organizations lack the necessary tools and strategies to build an opt-in database.

For example, many organizations are required to obtain a customer’s consent in order to contact them on their mobile device using automated telephone dialing systems such as predictive dialers, automated voice messages or outbound voice recording, and text messages. Many organizations lack the necessary tools and strategies to build and maintain an opt-in database.

This fall, the latest rollout of Federal Communications Commission (FCC) requirements for express written consent were enacted to align the FCC’s regulations with those of the Federal Trade Commission (FTC), all in accordance with the Telephone Consumer Protection Act (TCPA) regulations. What all this government agency and regulatory-speak boils down to is that call centers need to be more vigilant than ever about toeing the mobile line.

One option to consider comes from Genesys | SoundBite Communications and its preference management solution. This groundbreaking solution provides an all-inclusive and compliant opt-in program that:

- Delivers communications to customers asking them to opt-in to voice, text and email communications;
- Captures opt-in requests over multiple channels;
- Builds and maintains a compliant opt-in database, including the required and ongoing removal of customers who deactivate their mobile service;
- Provides expertise to help maximize opt-ins and minimize opt-outs.

Obviously, the consumer communications landscape has changed for today's organizations, but regulations are often slow to catch up. The impact of the aforementioned federal regulations, along with the rise of consumer choice, and the desire of consumers to control who contacts them and when, have forced companies to re-evaluate their communications strategies. Not only is there a need to ensure that messages are effective, but messages must also be compliant, desired, relevant and delivered via the now optimal mobile channel.

Why Now?

Building an opt-in database can deliver a lot of value to an organization, but it's also an investment that can have long-term rewards. Among the benefits, implementing an opt-in program enables organizations to:

- Mitigate regulatory concerns;
- Maintain revenue streams;
- Enable cross-promotion of products and services;
- Facilitate program enrollment; and
- Increase message relevancy and response rates.

Permission-based communications has become the standard for b2C interactions, driving growth vie multichannel engagement while complying with regulatory requirements.

When making the decision to build an opt-in database, it's best to first perform an assessment of the contact data you already have on hand. This will assist you with identifying gaps so that you can prioritize the data you need to focus on capturing. This includes opt-ins for mobile outreach, additional information for contact, and channel communications preferences. Overall, it's best to utilize a multi-channel communications strategy to capture this data as quickly as possible. This will help you maximize the number of consumers that want to receive your communications while meeting necessary regulatory requirements. Some suggested vehicles to capture opt-ins and communications preferences include:

- Proactive outbound voice
- Inbound toll-free number (IVR)
- Email
- Web site
- Direct mail
- Applications and account forms
- Print advertising
- Point of sale/branch
- Social media

Proactive Opt-in Strategies

When proactively requesting that consumers opt-in to receive your communications, there are a number of approaches that can be used to maximize response rates and data captured. For example, providing consumers with options for the types of messages they wish to receive, along with their preferred channels, can lead to higher response rates and the development of stronger customer relationships. Demonstrating to consumers the value of opting in by providing examples of the types of relevant communications they would receive is another way to increase opt-in rates. An additional strategy is to solicit opt-ins immediately after consumers have had a positive experience with your brand, be it in person or via a call center agent. This may consist of feedback captured in surveys or positive comments made to customer service reps – both of which are optimal times to ask. Finally, some organizations can boost in their opt-in rates when tying in the request with a promotion or special offer.

Maximize Opt-ins, Minimize Opt-outs

An effective communications strategy helps ensure that the messages you send are relevant, welcomed, delivered to the right contacts utilizing the right channels, and meet regulatory compliance. Genesys | SoundBite has the solutions and the expertise to assist you with developing and implementing programs that maximize your opt-ins and minimize your opt-outs, leading to more profitable, lifelong relationships with your customers.

The Value of a Virtual Contact Center

By Paula Bernier

Savvy business owners know the value of a well-functioning contact center. It serves as the voice and “face” of your company, and can be invaluable in building and maintaining your customer and brand.

When you have a well-trained and responsive team in your call center, your clients know they’ll get the answers to their questions quickly and professionally. It’s “Branding 101”, and managed correctly, a good contact center not only helps retain clients, but the positive word of mouth, generated faster today thanks to social media, can bring new customers into the fold.

But the downsides of deploying and maintain a physical contact center can be daunting.

First and foremost is cost; you not only have the expense of a physical plant (office space, electricity, lighting, heating, parking, rent, taxes, upgrades, etc.), but you are also limited to that one geographical area for your hiring and staffing needs. Even in a tight economy, people will only travel so far for a job. No matter how good your pay, benefits and working conditions, if people have to travel a long distance to get to “the office,” they’re going to think twice before accepting a position. That’s why a cloud-based Virtual Contact Center is gaining popularity.

What a Virtual Contact Center

Simply put, a virtual contact center (VCC) can exist everywhere. A VCC is a call center technical solution that supports call center agents who are geographically dispersed, instead of all working out of the same physical call center location. With a virtual call center, the agents typically work from home. In such a scenario, agents just need a phone, a computer, and a Web connection. To start up a virtual call center, the organization invests in a technical solution that will allow incoming customer service calls to be routed to the appropriate remote agent.

One option available to companies considering a VCC is the Genesys | Angel Virtual Call Center Solution. Their VCC– also known as a Cloud ACD (Automatic Call Distribution) – enables businesses of all sizes to put their customer experience (CX) first.

The Genesys | Angel VCC or Cloud ACD solution offers:

- Fast deployment and scalability
- An easy-to-use, intuitive interface
- Live call-quality monitoring
- Agent-to-agent chat availability
- Embedded business analytics for end-to-end transparency
- Industry-leading SLAs with demonstrated uptime record
- Powerful call routing based on business rules
- Simplicity of the cloud with a proven global platform
- Route on IVR variables with context delivered to agent with the call
- Reporting for full transparency into the call center

- An industry-first VCC mobile app

Better still, since it lives in the cloud, there are no upfront investments in hardware, software, or human capital -- allowing your call center to be up and running in just a few hours, as opposed to weeks or months. Plus, the intuitive monitors empower both agents and supervisors to provide the best possible customer experience.

Successful Experience

One leading global professional services and consulting firm – which specializes in application management services (AMS) to maintain and continuously improve client application portfolios -- uses Genesys | Angel as a VCC solution. (The firm supports a number of public and private sector clients, managing everything from SAP and Oracle implementations to custom development environments.)

Back in 2011, the firm realized its freestanding server cluster used to deliver IVR support for a limited number of customers was outdated, and would be costly to maintain or upgrade, and it was starting to affect meeting their customer's needs. The firm was hampered by an inability to quickly ramp up, or efficiently manage surges in daily operations, or handle any disaster recovery or continuity planning requirements that were vitally important to their prospective new customers.

The cost quoted to upgrade just the hardware and software came to a little under $1 million, and didn't include internal support costs or the building of an offsite backup/recovery center. "The numbers came in so high I thought I was being punked," said Steven Brunger, Technology Delivery Manager for professional services firm Deloitte Consulting

Brunger began exploring the possibility of a hosted IVR cloud service to help clients scale call center services without the need for costly hardware and software infrastructure investments. Genesys | Angel proposed a customized cloud-based IVR service at a cost much below anything the professional services firm had seen with on-premise providers.

Going with the Genesys | Angel solution, a full deployment and implementation was ready to accept customer calls in under a month.

With no equipment to install, and costs that are dramatically lower than traditional server-based call center implementations, Genesys | Angel's Virtual Call Center delivered the dedicated resources required for each client, including a phone number, routing queue, and ongoing support services to meet each client's ongoing call center maintenance requirements.

Because the Genesys | Angel VCC solution functions without the need for a time-consuming and costly equipment implementation or ongoing maintenance fees, the speed of turnaround for ramping up new clients is a game changer for any company looking to move quickly.

Reducing geographical restrictions in the professional services firm's call center operations has also helped expand the company's business opportunities, especially when it comes to reaching global clientele. A large portion of its traditional client base comes from U.S. federal agencies, which are mandated to use U.S.-based call center operations. Now about 70 percent of new client opportunities are international, which is a direct result of the ability to extend call center operations abroad to areas that are more geographically and socially tied to the clients the firm now supports. "Based on client needs, we can expand specific call center services without working within previous limitations faced by our workforce and infrastructure restrictions," Brunger said.

United to bring you…
Global Cloud Contact Center Solutions

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