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PERSPECTIVE

Rich Tehrani,
CEO, TMC

What's New in Call Center Testing and CRM

One of the challenges call center managers have is testing their systems when deploying new solutions or modifying existing ones. As the most crucial link to many customer interactions, the contact center can play a pivotal role in keeping customers happy, continuing to recommend a company and keeping them coming back for more.

To learn more, I sat down with Lynn Evans, who is an independent systems engineer deploying call center solutions. In the past she has worked for banks such as Franklin Templeton Investments and Wells Fargo. She brought me up to speed on a testing company she is working with called Cyara Solutions. According to Evans, "The solution costs less than other tools – you can buy it for less than the cost of renting from the competition." She went on to explain that using Cyara's solutions allowed her QA team to focus more on intelligent evaluation rather than grunt work.

Other salient comments she made were that with this system she can test 100 percent of changes not just a fraction of them. This resulted in a deployment time of one day instead of up to eight weeks using other systems, she said.

The company's CMO Dan Nordale told me the company is relaunching the brand and thinks it is poised for significant growth in the future. The company seems to have a nice niche in banking as the company says nine of the top 20 banks are using it so far.

In addition to better contact center solutions, companies in recent years have moved to offer better customer service and better internal results by more broadly embraced contact management solutions, now more commonly known as CRM systems.

When this magazine started covering the contact management space in 1982 there were precious few choices of technology to use – typically, most companies used index cards to manage their contacts. Shortly thereafter Salemaker became a wildly popular program, which ran on PCs when floppy disks were the way to install software. Then Telemagic came onto the scene and took the world by storm.

In the mid to late eighties, SCO UNIX became ever so popular and Brock Control became the most widely used contact management app of its day running on this platform – quickly taking share from software that ran on minicomputers from companies like IBM.

All three of these companies fizzled out just before Siebel Systems came onto the scene in the nineties by popularizing the term CRM and effectively making contact management seem like it was a legacy solution. Oh, and it's SuperBowl ad didn't hurt either. Oracle bought the company some years later and rolled up much of the CRM space, and then Salesforce.com came out with a cloud-based architecture that differentiated the company from the rest of the field.

This is a dramatic simplification of the market, but the point you should take away is that contact management/ CRM is a dynamic market with new players eclipsing old ones almost constantly.

That's all I could think about when I spoke with Pipeliner CEO Niklaus Kimla.

The company's system is designed by salespeople for salespeople. It is written in Adobe Air – it is cloud-based but also works when the data connection has slowdowns and other issues. It is graphical, and it was built to work with social. It is also target-based so salespeople can see where they are relative to where they need to be. They can also graphically see the buying team in a target company – the reports and the dotted lines between buying teams.

Kimla thinks his solution is a game changer and that "CRM sucks for sales." Salespeople are entrepreneurs, but they are generally not treated as such, he said. He believes that his company's software can help salespeople improve and more importantly allow them to collaborate to close sales more successfully as a team. In other words, it is successful at pairing strong closers with lead gatherers.

He showed me the company's latest update feature called Timeframe, which is designed to track pipeline velocity. In addition it is designed to better integrate marketing and sales. The new release also allows mass updates, and has tighter integration with Microsoft Office and numerous cloud and marketing platforms such as Google Drive, Hubspot, Constant Contact and more.

Kimla was certainly enthusiastic about his company's prospects in the space and spoke at length off-the-record of the company's many successes competing with other established CRM players. It will be fascinating to watch how the company does over time and if it becomes the household name in the CRM space in the future.

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ANGLE

Paula Bernier,
Executive Editor

Dynamic ITEXPO Panel Offers Salient Tips on Social Media Strategy

Putting together an effective social media strategy involves harnessing your enthusiasm about your brand and relaying that in an effective – and non-offensive – way to your customers, your prospects and the world.

That was one of the key takeaways from the session "What Every Executive Needs to Know about Social Media" at the recent ITEXPO Vegas. The session, moderated by Blair Pleasant of COMMFusion LLC and UCStrategies.com, included the well-versed group of panelists Garrett Smith of Smith on VoIP, Jeremy Watkin of phone.com, and David Vaughan of TSG Global.

"Think about how you would interact with people at a cocktail party," suggested Vaughan. "Would you stand on a table and yell 'Me, me, me, me, me'? No."

You probably shouldn't behave that way on social media either, he said.

Companies on social media should always be business-appropriate but should not be afraid to take the conversation away from all business and open the conversation to discussions about life, family and personal interests, suggested Smith, adding that nobody wants to talk business all of the time. He calls this approach business casual.

Pleasant kicked off the session by offering some basics. She talked about there being two types of social networking – external/public, like Facebook, Google+, LinkedIn and Twitter, and internal/enterprise, like Cisco WebEx Social, IBM connections, Jive and Yammer. She also asked and answered the question: What is social media? Her answer: content, like profiles, blogs, microblogs, wikis, forums, filesharing; connections, involving people and expertise finding; conversations, including activity streams and commenting; and capabilities.

There are lots of ways to address customers on social, she said. You can monitor their conversations about your company using tools from companies such as Buzzient and Radian6, and you can choose to respond or not. If you choose to respond, the best method is often to send a quick acknowledgement of the customer's concern and then offer an answer to that individual's request. It's better yet if your company can engage the customer in the process of the social interaction.

To help individuals know how to best use and respond to social media, she suggested, create a social media policy and guide. Start by listening, she said, and then put together a plan for how to respond.

If you're going to use social media as a channel to respond to customers, be sure to respond to them in a timely manner, the panel agreed; otherwise, it doesn't make much sense to have a social customer service strategy or a Twitter feed. Smith suggested it's best for companies to respond to social media customer requests or comments within two to four hours. If you wait longer, he said, "you just give that person time to stew and boil." Vaughan added: "Think about e-mail, would you let it sit a week?"

Another thing that's important to remember is that these sites are public and everyone can see your comments, so you may want to take conversations offline in some cases, the panel suggested.

"Just remember that everyone's watching," said Smith. "If it's a gray area, walk away."

And don't engage people who are just complaining for the sake of complaining, said Vaughan.

"Do not feed the trolls," he added. "There are just people who hate life, and hate their life, and want to inflict their misery on anyone they can."

Despite the negativity commonly associated with social media, it does offer a lot of great opportunities to learn from and connect with customers and with others at your organization. So, if you're ready to jump into social media but aren't quite sure how to start, just do it, said Smith.

He just did it by starting to blog and post on social media, and one day a guy in the industry noticed and invited him to a networking industry event at ITEXPO with some industry big wigs. Smith said he led from the front in his organization, but it wasn't about him, so he then set out to bring others from his organization into the social media loop. He did that by creating what he called the A-team, which included others at his organization with an interest in learning about how to use social media and then providing their particular expertise to the company's social media initiatives. Others can do this kind of thing too, he said.

Social media seems daunting to some, but it's happening, and you should get involved, he added.

"Don't not participate," said Smith. "Don't be scared. Don't be afraid. Get out of your comfort zone. Get out and try it out, it's a lot of fun."

by Paula Bernier

CX Hot Trends Symposium to Provide Insight into the Customer Experience

Delivering a positive customer experience is just good business. But ensuring that customers, partners and prospects have positive interactions with – and impressions of – your brand is becoming even more important. That's because the new connected consumer has more choices of suppliers, more opportunities to use online resources for comparison shopping, and more available venues through which to vent their dissatisfaction if they don't get what they want when they want it.

To be competitive, organizations today must provide the products, services and support that customers have come to expect – and quickly, as most of us have grown accustomed to immediate gratification in today's always-connected world. Speaking of connectivity, customers want to connect with businesses based on their own personal preferences. That means organizations need to be ready, willing and able to interface with customers and prospects over any and all communications media, and to do it seamlessly and effectively. And rather than simply pushing out products and messaging to the masses, customers want solutions and service that cater to their individual needs and preferences.

"The world has become an increasingly competitive place, and there are so many products and services out there that it's critical organizations distinguish themselves based on their customer service," Interactive Intelligence CEO Don Brown noted in the cover story of this magazine a year ago this month.

All this explains why a focus on customer experience is now center stage at many organizations. Indeed, a fair share of businesses have already established new executive positions and teams to specifically address customer experience-related initiatives and concerns. As last month's issue of CUSTOMER magazine notes, the chief customer officer has become widespread at companies of all sizes: CCOs exist today at 40 percent of $1 billion-plus enterprises, 46 percent of enterprises with less than $250 million in revenues, and about 15 percent of mid-sized companies.

But even after customer experience has been identified by an organization as a key strategic initiative, and personnel

CX HOTTRENDS SYMPOSIUM
SHAPING THE CUSTOMER EXPERIENCE

have been installed to lead the charge, there's no set script for how it should all play out. So it can be helpful to learn from customer experience experts about best practices, key trends and developments, and what's working and not working for others.

This thinking is what led to the creation of a new industry event called CX Hot Trends Symposium, jointly produced by Interactive Intelligence and TMC, to take place June 2-4, 2014, at the Indianapolis Convention Center.

The event is targeted at those with such titles as CCO, vice president of customer experience, contact center director – or anybody with a focus on the customer.

"CX Hot Trends Symposium is the best collection of speakers focused exclusively on how to make the experience that a company delivers to its customers a strategic business advantage," says Joe Staples, chief marketing officer at Interactive Intelligence.

Unlike other gatherings that attempt to address everything and the kitchen sink, Staples says the CX Hot Trends Symposium will offer in-depth analysis of the nine hottest technology trends shaping the customer experience. Interactive Intelligence did a lot of research to identify those top nine trends, says Staples.

The following are the nine trends that will be covered during the event:

- Cloud-based communications
- Data analytics and new-model KPIs
- Innovative self-service
- Mobile customer service
- Multichannel communications
- Proactive customer care

- Social customer service
- Video-based customer service
- WebRTC

Featured speakers at CX Hot Trends Symposium come from leading analyst and consulting firms, including Forrester, Frost & Sullivan, Gartner, IDC, McGee-Smith Analytics, and Ovum.

Among the speakers is Art Schoeller, vice president and principal analyst at Forrester Research. He will be talking about what's possible with self-service today and how you can use it to boost your revenues and cut costs.

Sheila McGee-Smith of McGee-Smith Analytics, meanwhile, will discuss how technologies like analytics and mobile customer care applications are enabling companies to make sure customers have the information they need, when they need it, even as conditions change. The session will explore best practices for using, not abusing, proactive customer care strategies.

"What's unique about the CX Hot Trends Symposium is that it approaches the discussion from a customer experience perspective rather than from a contact center technology one," says McGee-Smith. "This shift in focus makes this event particularly significant."

To review the complete speaker lineup and session summaries, visit www.cx-expo.com.

Attendees of CX Hot Trends Symposium will also hear keynote addresses from angel investor, best-selling author, and social media advisor Jay Baer; famed outdoorsman Aron Ralston; and Interactive Intelligence's Brown.

Baer is president and founder of Convince & Convert, which has conducted social media and content marketing projects for such notable clients as Billabong, BMC Software, Caterpillar, Columbia Sportswear, Nike, Petco, Visit California, and Wal-Mart. He is also the author of the books "YOUTILITY: Why Smart Marketing is About Help not Hype" and "The NOW Revolution: 7 Shifts to Make Your Business Faster, Smarter and More Social."

Ralston is the subject of the movie 127 Hours, in which he is played by actor James Franco. It tells the story about how Ralston's arm became pinned under an 800-pound rock while he was hiking in Utah, and how after five days trapped alone in the wilderness he took extreme measures to free himself.

Brown founded Interactive Intelligence, his third software company, in October 1994. He is CEO, president, and chairman of the board. Brown will showcase the next generation of cloud communications technology and discuss how increased flexibility can positively impact the customer experience.

CX Hot Trends Symposium will be collocated with the Interactive Intelligence annual customer and partner event, INTERACTIONS 2014. While the audiences of these two events will come together for the keynotes, Staples says that the symposium's educational opportunities were tailor-made for individuals with an interest in, and responsibility for, customer experience.

"There are a lot of shows that dabble on the periphery of customer experience issues," says Staples. "They'll take one narrow topic, or they'll lump them all into a 45-minute session. But to us, a multi-day event focused exclusively on the most impactful trends shaping customer service, and delivered by industry experts who would provide actionable advice, made a lot more sense."

To review the complete CX Hot Trends Symposium speaker lineup and session summaries, visit www.cx-expo.com.

Elaine Cascio

A Faster Horse?

How often have you heard the old chestnut that if Henry Ford asked a focus group what they would like, they'd tell him a faster horse? Last month, this column discussed customer research – types of research, benefits and where they can be valuable when designing customer contact channels, strategies and applications. Some of the feedback on the article was that customer research often stifles innovation.

To look to more recent examples, Steve Jobs believed that people really don't know what they want and has delivered some of history's most groundbreaking products. The Herman Miller Aeron chair I'm sitting on while typing this article received lukewarm reception from focus groups, with many asking what the upholstery would look like.

These companies believe in innovating first and researching later (one of the documents released as part of the Apple Samsung patent suit was a research and analysis study on why people purchased an iPhone over an Android device). It's a model that's been highly successful for them.

What this says to me is that you can't do away with customer research entirely. But you should use it wisely and appropriately.

For example, if you want to understand user behavior, ethnographic research provides valuable data that can spark, rather than stifle, innovation. Ethnography is a method that anthropologists use to observe the knowledge, belief systems and other elements that help define a culture. They directly observe people in their natural habitats. With this methodology, we understand how consumers use products or services in their day-to-day lives, how often, where, under what circumstances, and compared to other products. It not only helps to evaluate how products or services can be improved, it identifies potential new products or services and trends and patterns.

Detractors of focus groups claim that customers don't know or can't articulate what they want, that self-reporting is not as valuable as behavioral data, or that consumers don't have any idea what is really possible. Ethnographic research eliminates users' perceptions and self-reporting and goes right to the source to understand how people live. Companies like Intel have teams of anthropologists and ethnographers dedicated to this type of research to identify trends and future strategies.

Focus groups come under fire often. Critics say that asking participants what they want yields little in terms of innovation. How do you get beyond this challenge? One way is to have samples for participants to react to – a prototype of a VUI or a web page, for example. Another way is to use focus groups to get an understanding of your customers' mental maps – give them cards to sort to aid in design, for example. When doing IVR or web design, I often give participants sticky notes with categories on them along with some blank stickies. They group them in ways that make sense to them – and will add categories and functionality too.

Finally, releasing a new product without usability testing can miss excellent opportunities to gain deeper understanding of likely customer acceptance and ideas for further improvements. Like ethnographic research, usability testing lets us observe customers actually using a product. Is the language understandable? Is the sequence of events intuitive? How well do they perform in efficiency, accuracy and recall? What is their emotional response?

One of the keys to successful design is to provide customers something to react to or use. By observing them, we can imagine possibilities that help us all be more innovative. In a discussion about customer research, a colleague pointed out that someone other than Henry Ford may have been an innovator if he or she focused on the request for "faster" and not "horse." Understand and use customer research wisely to enhance, not impede, innovation.

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

Art Rosenberg

Contextual Customer Interactions Improve Personalization and Performance

Customer call centers have always strived to know who their callers were and why they were calling. That kind of information not only makes for more efficient call handling, but also makes customers more comfortable because their needs are quickly understood. In the old days, the technology relied on simple capabilities like caller ID to identify customers from the phone numbers they were calling from, as well as by simple IVR applications that asked callers to enter basic identifying information from a voice menu.

Customer communications, however, are in the process of changing dramatically, primarily because of the rapid adoption of multi-modal consumer smartphones and tablets. Coupled with the use of IP connectivity, this effectively provides consumers with more efficient and convenient direct access to both information and people. So, not only are mobile consumers more accessible, but they can do many things easier and faster themselves than when fully dependent on assistance from traditional call center agents.

The key to benefiting from increased customer self-services is not only to make the mobile user interfaces simpler to use, but also to allow for flexible and efficient access to live assistance, based on customers' contextual needs, as well as their choice of mobile contact. That's what personalization of business communications is really all about.

Click-for-Assistance vs. Dialing An 800 Number

In a recent post, I discussed the correlation of mobile self-services for consumers/customers with the need to provide convenient and selective access to appropriate live assistance, not just a warm body. Also, because mobile customers are not tied to just voice-only telephony connections, they will be able to choose how they want to connect. It won't always necessarily be an immediate voice connection, but could exploit all forms of messaging, chat, video, or even a social network post.

While such flexibility will help reduce the traditional real-time pressures for handling voice calls, it will also require customer-facing agents to be more skilled in all forms of contact interactions.

On the infrastructure network side, we have to look forward toward exploiting IP connections that don't go through the PSTN, but instead, connect consumer mobile devices through their browsers to access contact center staffs. That is a prime objective of the evolving WebRTC approach to real-time communications.

The Challenges of Migrating to IP-based Interaction Centers

Transitioning old, PSTN-based call center operations to the new world of mobile consumers and online mobile apps shouldn't be too difficult, because it will be an evolutionary journey, not an immediate replacement of all your old contact center technologies and call handling staff. It will, however, be a lot of work with new technologies.

What will be most practical is to plan on first migrating and trialing any existing customer online applications to a cloud-based service, along with new mobile user interfaces, with embedded WebRTC options for selective access to live assistance. After that, it will be appropriate to develop and trial new customer service options in the cloud environment, along with the necessary agent and expert desktop applications.

This may all be new and too complex for your existing call center operations staff, so expect to bring in third-party expertise in both planning and implementing those UC-enabled mobile apps for your particular vertical industry. Just remember, it's not just about reducing operational costs first, but, more importantly, about remaining competitive, improving business process performance, and satisfying customer needs efficiently and effectively.

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

Strategic Solutions series

How to Unlock the Potential of Your IVR

Featured in:

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How to Unlock the Potential of Your IVR

Let's face it. IVR systems don't have a great reputation.

That's a major problem for businesses in this new age of the customer. Bad experiences are frequently aired on social media, potentially damaging your brand, and adversely impacting your organization's ability to acquire and retain customers.

It's also a major problem for businesses that need self-service and multi-channel strategies to reduce costs and succeed in today's competitive environment.

The good news is that the IVR can be an effective tool both to control costs and to meet – and perhaps even exceed – the needs of customers.

Sounds good, right? But what does it take to get the job done? Perhaps less than you think.

Too many companies jump to the conclusion that they need an entirely new IVR platform and a new IVR design. That's a costly and high risk undertaking. The fact is most existing IVR systems are under-utilized and suffering from easily fixable application and voice user interface design issues.

The best way to fix it is via a data-driven and caller-centric approach, which requires:

- visibility of how callers interact inside your automated systems;
- the ability to follow callers to an agent after they leave the automated systems; and
- the tools to rewind the call, listen to the IVR interaction, and redesign it so the caller would have been successful.

With AVOKE Analytics, you can use a data-driven and caller-centric approach to make a series of precisely targeted improvements to your existing IVR. In a few iterations, you can achieve performance that meets or exceeds a new system without the cost, risk and disruption of a new re-design.

AVOKE suggests the following to help with common IVR challenges:

Maximizing Identification Success

Callers that authenticate successfully in your IVR have better experiences, higher survey scores, and higher self-service resolution rates. But many companies believe their identification rates are too low. And they are uncertain about what to do to make it better.

To maximize identification success, AVOKE recommends that companies:

- use analytics to automatically categorize IVR identification failures;
- drill-down and listen to callers fail in the IVR, then jump ahead and listen to how the agent identifies the very same callers; and
- use this root cause understanding of caller behavior to design and implement precisely targeted changes that improve ID success in your IVR.

Increasing Self-Service Success

Increasing self-service is similar to maximizing identification success, but with a focus on the self-service module.

Analytics saves time finding the right calls to analyze by automatically creating a category of failed self-service calls and categories of different types of failures. The most effective approach is a side-by-side comparison of how callers fail in the IVR self-service module and how the very same callers complete the transaction successfully with an agent.

The combination of a rich understanding of failure modes in the IVR along with strategies your agents use to succeed gives you the roadmap for improvements to your IVR self-service applications.

Reducing Transfers

Another fundamental question is whether your callers navigate your menus properly given the reason for their call. If you have high transfer rates, the problem may be that your callers are not behaving as your IVR/VUI designers hoped they would.

The biggest challenge in reducing transfers is re-assembling the parts of the call so you can discover where and how calls got mis-routed and then had to be transferred.

To improve IVR navigation and routing accuracy, AVOKE Analytics recommends that companies:

- find calls that went to the wrong agent and had to be transferred;
- examine the agent dialog to learn the true reason for the call and why it was transferred;
- replay the caller's IVR experience to see what menu choices they made and why; and
- follow the call to the last agent to see if it was transferred to the right queue and whether it was ultimately resolved.

With this end-to-end understanding of the call, you'll discover how to make improvements to your IVR menus so they don't mis-direct calls and cause unnecessary agent transfers.

Reducing IVR Abandons

One of the simplest ways to find problematic IVR abandons is to look for calls with excessively long time in the IVR, no self-service task completion, and the caller hanging up before going into a queue. By listening to a set of abandons at a specific location and discovering exactly why callers gave up, you can gain the level of understanding you need to make targeted changes to reduce abandons.

To learn more about how to how to unlock the potential of your existing IVR, visit www.avoke.com/IVR or email avoke@bbn.com. AVOKE Analytics by Raytheon BBN Technologies.

by Paula Bernier

Leveraging the Richness of the Web for Lead Generation

Conventional knowledge these days is that people and organizations want to be offered products and services that speak to their individual needs, and that companies can no longer throw things over the wall and expect positive results. Instead, they need to design and target products and services with customer needs in mind. This is no small feat; however, new web-based lead generation and addendum engines are now helping organizations better understand existing and target customers so they can offer them the right solutions at the right time.

Lori Wizdo, principal analyst at Forrester Research, says companies can learn a lot about their customers, or potential customers, by looking at how they browse and buy.

Traditionally, companies have collected information on their customers such as where they are, their number of employees, and the like. But now companies can expand those profiles by using tools that enable them to pull data on those organizations from other sources, like social network sites. For example, a recommendation engine might reveal that 70 percent of a company's clients are part of a certain LinkedIn group or go to a particular trade show. That provides a richer picture of the companies and individuals to whom you're selling. She adds that recommendation engines and similar solutions can also help a company that just met with several organizations at a trade show to identify which are the low-hanging fruit because they can match attributes of the organizations it has sold to in the past with the attributes of the new prospects.

Companies offering solutions that can help organizations expand customer profiles and ensure the information in them is correct and usable include Data.com and Jigsaw at Salesforce, Dun & Bradstreet, Infer, Leadspace, NetInfo, NetProspex, ReachForce, and StrikeIron.

Amnon Mishor, vice president of products and founder of Leadspace, which got its start in 2007, says the company offers technology that understands the ideal profile of the type of organization your company wants to go after. That profile can be based on the companies with whom your organization already does business. And it can build on that profile by leveraging the web for additional information.

Leadspace's solution is a combination of an engine that helps reach and score existing and new leads and that connects to existing CRM and marketing automation systems, says Mishor. The Leadspace package also provides credits that customers can use to buy additional data.

The engine looks for data on demand and connects to the user's marketing programs and campaigns. One of interesting use cases is connecting the engine to your web form, says Mishor, explaining that the platform can match the lead to information available via social media, such as the titles of individuals and what those companies are already using.

"We are what you would call a virtual database," says Mishor. "The web is our database."

Among the users of Leadspace are Jive, SAS and the Eloqua business of Oracle. Some of these customers started using the solution within their inside sales organizations, then expanded their use cases to other stuff such as marketing.

For the most part, the companies in the recommendation engine space like Leadspace are relatively small and young companies, so this is more of an emerging category, says Wizdo, but she does hear about such companies frequently from her clients.

She adds that some of these companies have formed partnerships with marketing automation vendors such as the Eloqua part of Oracle, the Pardot solution now owned by Salesforce, and Marketo. Marketing automation is a broad category, explains Wizdo, 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 adds that CRM and marketing automation are also obviously 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.

by Claudio Frascoli

Big Data, or Right Data?

The telecom industry faces a unique challenge when it comes to implementing big data. In a market where 40 percent of customers are willing to change providers for the sake of better service, improving the customer experience is a top priority. Collecting more information from customers is an important step in managing customer relations, and big data delivers a constant stream of data on current conditions for subscribers. And yet the standard approach to implementing big data is that with storage costs plummeting, every scrap of customer information available is collected to create one massive repository which generates actionable results. This time- and resource-intensive approach, however, entails several drawbacks for a market that requires real-time insights.

Because an effective customer experience management strategy is necessary to minimize churn, the telecom enterprise's approach to implementing big data requires real-time analysis. But with the sheer amount of information being collected in standard implementations, analyzing it quickly enough becomes nearly impossible. Taking a more intelligent, modular approach to big data, however, delivers the results telecom enterprises need. This approach could be termed right data.

The Right Data Approach

Taking a right data approach requires a shift in perspective, to realize that not all data is equally valuable to every group within the enterprise. Extracting just relevant information from one all-encompassing repository requires time, as well as dedicated IT staff to manage the process – in addition to the costly and extensive upgrades necessary to the infrastructure. The right data approach, however, involves working with existing databases to extract the information most likely to be useful, resulting in a less intrusive implementation process. This provides several important benefits for the enterprise, including the following.

- The big data project can be deployed more quickly, which is an advantage given that 55 percent of big data initiatives fail due to complexity in implementation and processes. Faster deployment also improves management support.

- With less time required to analyze data – because the database is smaller – the analysis and recommendations can be produced in real time, to immediately address customer needs.

- A big data project that requires less change in IT means that the initial investment required to gain big data benefits is lower.

- Closely related to this is that it's easier to convince management of the efficacy of the big data project when a small-scale deployment is possible initially. Once the benefits are visible to executives, they will more likely approve additional budget for expanding the deployment.

- A right data approach more easily delivers insights to specific business units. In addition, with different silos in the company able to produce their own analysis, there is less of a burden on IT manpower, further reducing costs.

What the Right Data Solution Looks Like

Turning big data into right data begins with deploying an intelligent customer experience management solution. The ideal implementation should focus on several goals to improve customer relationships while reducing expenses. That should include the following.

- A right data system will be able to build a link between several data sources, rather than one all-encompassing database. By providing each business unit with the information most relevant for its activities, the right data is closer at hand, and the CEM can produce insights more quickly.

- The right data system should be implemented with a modular approach, first selecting a few use cases and working to produce insights based on relevant information. Once the benefits are realized, it can then be expanded further.

- It should also be able to deliver insights in a manner that is easily understandable to the user. A marketing report should be able to have marketing-specific insight to guide actions, such as users who are not using all the services their devices are capable of. This reduces the need for an additional layer of data experts to translate insights into understandable actions.

- The CEM should deliver real-time visibility into the current performance of services for customers, enabling the telecom provider to quickly identify problems. This will reduce customer service calls, improving retention while reducing operational expenses.

- The right data system should automate functions wherever possible. For example, to maintain a high level of service, it should have the ability to adjust non-intrusive device settings without the need for manual intervention on the part of the user or the service provider.

- As important as the user experience is, the ability to measure results is key. The business needs to determine the success rate of its technical and marketing initiatives, which gives it insight into where to focus customer relationship efforts to maximize results.

Claudio Frascoli is strategic marketing director for operator business strategies at Nokia Solutions and Networks (www.nsn.com).

by Paula Bernier

Kaon Brings 3D Interactivity to Product Demonstrations

There's nothing like a hands-on experience to help customers decide whether or not a product is for them. So a company called Kaon Interactive is enabling companies to let customers and prospects take a test drive – but without the risk and expense of actually handing over the products themselves.

Kaon Interactive does that by providing interactive applications that deliver a 3-D experience, explains CEO Gavin Finn. This kind of solution is particularly effective for companies that offer complex products in highly competitive marketplaces, Finn says.

For example, several telecom vendors, including Ciena, Cisco, EMC, Hitachi Data Systems and Juniper, have used the Kaon 3D Product Application and new v-Rack solutions to deliver virtual versions of their network elements. Not only are OEMs like Cisco and Ciena using this as their primary demo for data center solutions, but channel partners are using this as well.

These interactive solutions allow people to see and interact with highly photorealistic products, removing and installing line cards, doing other configuration and maintenance maneuvers, and the like. Marketing messages can also be integrated beside the virtual products to describe key features.

The idea here is somewhat analogous to the virtual tours you can find on popular real estate websites. They put the customer or prospect in the driver's seat and allow them to view and control the experience. Businesses can use the Kaon platform to create an interactive solution just once and use it in various venues, such as in its offices, for customer meetings, and at trade shows.

Kaon creates the solution and delivers it as a turnkey package, typically within a price range of $5,000 and $20,000. That can be a whole lot more cost effective than shipping product to a trade show, for example, and running the risk of the equipment being lost or damaged. That's not to mention the exhibitor floor real estate saved.

It can cost $80,000 per trade show just to ship racks, says Finn, so by using the Kaon solution equipment companies can recover their cost in just one trade show. That's more important than ever these days in light of there being fewer big telecom trade shows and more smaller events, he adds.


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by Paula Bernier

Something to Talk About

Yappem Rewards Customer Feedback, Helps Businesses Move in the Right Direction

Yappem wants to help companies learn from their customers and, in the process, avoid what co-founder Dave Sachse calls "a Kodak moment."

The little Sheboygan, Wisc.-based company is doing that by offering a social platform that rewards users who share their input about select brands with friends and family. The rewards come in the form of virtual coins that people can exchange to get actual gift cards, products, or special deals from a variety of retailers. The more valuable a post is deemed, the more virtual coins the contributor receives.

The ultimate goal is to give businesses the insight to help them grow with their customers, so they don't lose sight of the market, as did companies like Blockbuster and Kodak, says Sachse.

Sachse is a huge customer service and brand junkie advocate, he says. Perhaps this aspect of his personality took shape during childhood, when he spent time with his grandparents at their local retail store, Sachse Luggage and Gifts, and with his uncle and aunt, who worked in the restaurant industry.

"My dad said the best competitive advantage is your relationship with your customers," says Sachse, "and that really stuck with me."

Yappem co-founder Justin Webb, who was with McKinsey & Co. for 12 years before launching the startup with Sachse, explains that the company provides a social network unto itself, and it's up to end users to post to that, or to Facebook, Instagram or Twitter. An example of a posting might involve a picture of a favorite pair shoes or a comment about a good restaurant, or doctor or dentist, says Webb.

Importantly, Webb adds, positive and negative sentiments get the same level of rewards. That way, he says, people are encouraged to share their real-world experiences.

Yappem co-founders Justin Webb and Dave Sachse award a $12,00 shopping spree check to blogger Danielle Smith.

Chloe Jefferys commented her way into a pair of designer Manolo Blahnik shoes.

McDonalds, one of Yappem's early customers, especially liked that aspect of the solution, says Webb, adding that it not only gave the fast food company insight into customer opinions but also enabled the company to avoid running afoul of SEC regulations that discourage companies from offering incentives only to those who say good things. Menchie's Frozen Yogurt is another customer of Yappem.

To get customers engaged in offering feedback, Yappem reaches out to social media influencers and does a lot of what it calls guerilla marketing within social circles to garner interest in the effort. When CUSTOMER spoke with Yappem later this summer, the company also was getting ready to start some large promotions and major giveaways and was working on a minor revamp of its user interface.

by David Andreadakis

Why Personalization is the Key to Customer Loyalty

During the many trade shows and conferences Kobie executives have attended in the past year, the recurring theme of personalization has been a top agenda and conversation topic.

At Kobie, we've also talked a lot about personalization when it comes to pricing as well as offers. Despite some retailers cutting their loyalty programs altogether, personalization is clearly on loyalty marketers' minds: how customer relationship management and the use of mined customer data can help tailor shopping experiences to individual customers. When combined, these themes get to the very heart of how today's loyalty programs can use available customer insights, gathered through all channels, to deliver a seamless experience that engages those customers with offers that speak to their personal preferences.

This focus on personalization is critical when you consider the latest loyalty program data. Loyalty programs grew by more than 25 percent during the past two years. Yet customer engagement dropped by 4.3 percent between 2010 and 2012.

Mixed data like this suggests a loyalty disconnect. Members are joining, but they're not engaging with the level of enthusiasm and dedication loyalty marketers are looking for. Whether the problem is rewards that are irrelevant or too much trouble to redeem, for marketers,

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customer dissatisfaction and program apathy remain very real concerns. Thus, personalization is key when it comes to combating customer disengagement and driving richer customer loyalty. As different as customers are, one uniting factor is the desire to feel like the brands and products they use and love are tailored specifically for them.

Personalization is vital not just on one channel but through an omnichannel loyalty framework that drives, tracks, measures and rewards incremental behavior throughout the customer experience. Much of this omnichannel outreach is occurring via digital channels, making the accumulation of, and the real-time action on, customer data that much easier.

Combined with CRM software collecting data such as customer likes, dislikes, amount spent, purchases made and frequency of visits, loyalty program members in all demographics can become newly-engaged customers – provided their wants and needs have been genuinely catered to and addressed.

This is true even though consumers remain concerned about the safety of their information while aware that this same information might improve their relationship with a brand. Ninety percent of consumers worldwide are worried their data could be hacked and used to separate them from their hard-earned cash. Meanwhile, 85 percent of consumers know brands need to gather their information to create personalized offers while half say they approve of trusted brands using their information to tailor individualized shopping experiences.

Insights collected through engagement across multiple channels must be used to present customers with offers that are relevant and add real value to their lives. Otherwise, they'll take their business elsewhere – a conclusion derived from the 2013 Maritz Loyalty Report, which found that over half of U.S. loyalty program members ended their engagement in the past year. The reasons for their disengagement are obvious: offers that didn't speak to their needs or rewards and perks that felt forced.

One of Kobie's clients, BJ's Restaurant and Brewhouse, a hybrid restaurant/retail chain, rewards members of its Premier Rewards program in an omnichannel manner and delivers a genuinely personal experience. Upon arrival, customers can check in with their mobile devices or at the hostess stand, where a table management system pulls up individual customer profiles. That way, the restaurant already knows, for instance, if a customer's child is fond of a dish or whether a patron is lactose intolerant. This indicates to customers that BJ's knows their preferences because it values them and their business. BJ's is but one of a growing number of brands recognizing the need for loyalty offerings that go beyond the usual points-for-rewards offers to provide great shopping, dining or entertainment experiences that align with each customer's preferences.

Loyalty programs grew by more than 25 percent during the past two years. Yet customer engagement dropped by 4.3 percent between 2010 and 2012.

In our increasingly fast-paced world it's easy for customers to feel as if they're being treated like numbers and not individuals. But it doesn't have to be this way as we have the technology that can rapidly reverse this sentiment.

Personalization used to be achieved on a small scale: imagine the local grocer remembering a customer's name and his or her daily shopping preferences or a business owner contacting a customer when new stock arrived. Today, however, personalized omnichannel engagement scales those very human efforts to a much larger arena and ensures that customers feel personally rewarded while remaining committed both to the brand and the brand experience. Marketers making efforts like this will ensure that future loyalty reports show greater customer loyalty program engagement levels – not less.

David Andreadakis is vice president of loyalty strategy at Kobie Marketing (www.kobie.com).

by Paula Bernier

How to Motivate Contact Center Agents

And Improve Customer Satisfaction in the Process

Motivating contact center agents is not about a one-time effort or a specific technology. As with any kind of employee, nurturing and motivating an agent is an ongoing process that starts with identifying and hiring the best candidate, providing that individual with the right tools and training to do the job, and keeping things interesting for him or her over time by offering incentives and rewards for good behavior and positive results.

Impact Learning Systems is one company that addresses the training part of the equation. The 20-year-old training business, which became part of Miller Heiman last year, helps clients provide consistent training to contact center agents, tech support, and those who manage such employees.

Be Creative

The company is a big believer in using games during the training process to help people learn in a more creative way, explains Jodi Beuder, marketing manager. In fact, founder Peggy Carlaw has written the following books on the subject: The Big Book of Sales Games; The Big Book of Customer Service Training Games; and Managing and Motivating Contact Center Employees.

The last title tells a story of two contact centers, each with about 150 agents, working on a four-month outbound initiative. One does great; the other flounders. The successful one had a manager who attended parts of the agent and supervisor training; called regular meetings with supervisors to review results and share information; used the feedback models encouraged during training; and remained involved and continued to encourage the agents over the life of the program.

Beuder adds that Brocade, a customer of Impact Learning Systems, has mentioned that people within its organization were more interested in participating in training because they knew their managers were taking the same training. (Brocade, by the way, uses the Impact Learning curriculum to onboard new employees India, London and North America. As a result, Brocade has been able to improve customer satisfaction by 33 percent and increase level 2 resolution rates by 20 percent within just three months.)

Offer Paths to Improvement

Providing training that helps people understand what they tested great and not-so-great on can also help motivate them to advance in the needs-improvement categories. To help encourage that, Impact Learning Systems displays a skill proficiency graph after completion of exams. That way, students can not only see how they did on what subjects, but they are provided with a series of links that take them directly to the content for which they need review.

Incentives and recognition are also helpful in motivating agents, Beuder says. For example, one client of Impact Learning Systems used a huge bulletin board in the contact center break room on which managers could congratulate people for their successes in such metrics as having the least call escalations in a given month, she says.

Giving agents and other customer-facing employees the ability to revisit training materials as needed also can go a long way toward enabling agents to meet company goals, says Beuder. Because Impact Learning Systems' online licenses offer 6 months of access, she says, participants can revisit and review the content along with utilizing the post-training reinforcement tools built directly into the system.

Keep It Simple

Making things simple for agents can have a big impact.

This point is also emphasized in a study released earlier this year by LiveOps and Social Customer Service Expert and Adjunct Professor at UCLA, Dr. Natalie Petouhoff. The study looked closely at the connection between a brand's customer service agents and its customer experience – and the impact of both on operational costs and revenue generation in the contact center. A key focus of the study was to look at how agents are impacted by multi-channel contact centers.

The study revealed that 26 percent of agents' time in these environments is spent just trying to navigate all the different channels that they're being asked to cover. That 26 percent can add up to $250,000 of wasted time annually for a 60-agent call center. A caller may, for example, ask the agent if the company received his or her e-mail, and then the agent needs to put the caller on hold and find that e-mail. That creates a lot of downtime for the agent and can frustrate customers and agents, says LiveOps.

Agent frustration can rub off on callers, the company adds. According to the study, 92 percent of end users are totally turned off to a brand if they sense that the agent is unhappy. To make agents happier, the company suggests contact centers bring their channels together on one screen for easier navigation.

Listen to Voice of the Agent

Companies that take into consideration agent input when re-engineering their contact center processes and technology tend to have the most success, say Anna Convery, executive vice president of strategy, and Paul Sewell, senior director of communications and intelligence, with desktop automation company OpenSpan, which has been doing work investigating how customer satisfaction scores relate to contact center desktop activities.

One company that serves as a good example in this realm is a telecom company outside the U.S. It holds quarterly meetings with agents, operational folks, the IT team, sales and marketing, and owners in an effort to gather and implement the top eight to 10 suggestions for improvement. That enabled the business to become one of the top organizations in terms of customer satisfaction scores.

Giving agents more of a stake in the process by providing them with a complete view of the customer journey can also improve contact center metrics and agent and customer satisfaction, according to OpenSpan, which refers to this concept as the agile agent desktop. Business has become very metric-driven but that requires companies to supply metrics at a granular level to affect change, says OpenSpan.

Agents become demoralized if they are being measured on things they can't control, such as slow systems, complex processes, processes that take a long time to instigate (new account openings, address moves, AHT etc.), says OpenSpan. Automation makes these things simple for the agent, it says, and ensures that the company is measuring things the agent can actually impact.

OpenSpan offers as an example how a mobile provider contact center used its solution to add a timer to the agent toolbar. It showed agents how long they had put a caller on hold. Indicating time on hold to a call center agent motivates them to re-engage a customer every 60-90 seconds, according to OpenSpan, which reports that for the mobile provider this resulted in a dramatic increase in first call resolution and a decrease in customer hang ups.

by Erik Hagaman

How to Motivate Contact Center Agents

And Keep Them Engaged for the Long Haul

It seems like a pretty standard process – post the job opening, sift through countless resumes, invite candidates for interviews, and hire the individual that's the best fit for the job. That is commonly followed by training, onboarding and educating the new hires. Done? Not really. The key ingredient in creating a valuable workforce comes next – where's the ongoing motivation?

In today's contact center, keeping call center agents engaged and motivated is more important than ever before. As the contact center is becoming a more strategic part of the overall customer experience, it is increasingly being seen as a revenue driver rather than a cost center. Critical data is exchanged during each customer interaction within a contact center, which can unlock incredible value when it's tied to an overarching CRM effort. Contact center agents facilitate these interactions as they man the front lines of customer contact and have slowly become the face of today's brands. Agents need to be properly invested in to help them deliver a unique experience. But what do agents really need?

Understand the Plan

Employees need to understand how their day-to-day actions influence their overall performance and how it impacts the larger team and company as a whole. Business executives now have more tools and metrics to monitor each agent; likewise, agents have daily performance tools to monitor how they're trending against their own personal goals. This type of transparency, between the company and the agent, results in increased agent motivation.

According to a 2012 Forrester survey of customer service strategy decision makers, about half of the respondents agreed that agents lack the right tools to monitor their performance, with 52 stating reporting is suboptimal. Adequate performance metrics and reporting tools give companies concrete criteria to determine the next set of agents deserving of a promotion and upward movement within the business.

From an agent perspective, what's more motivating than knowing more prominent, leadership roles are in your future if certain performance metrics are met?

Cultivate Good Culture

Building and sustaining a culture of company trust can promote agent empowerment and motivate employees to collaborate and work together as a team. By investing in employees, promoting open communication, and behaving in an ethical and socially responsible manner, organizations create a feeling of trust and job security that creates higher employee engagement, which is often reflected in their interactions with customers.

Encourage Autonomy

Studies have shown that when employees like their jobs, they are more productive and deliver better service to customers. Granting agents control over their own schedule where they manage their own time, which is shown to reduce stress levels on the job, is one way to create this type of employee satisfaction. This policy also fosters a healthy work-life balance and can help reduce agent attrition, which has direct impact on the company's bottom line. According to Dresser & Associates, turnover costs can run anywhere from 25-250 percent of a position's salary, so reducing agent burnout could serve as a significant cost savings for the company. In fact, Alaska Airlines implemented an at-home agent initiative to allow company agents to work remotely from home and manage their own schedules. As a result of the at-home agent program, the airline has seen an increase in productivity and company revenue in addition to improved levels of customer service.

Love from Leadership

Embedding wellness efforts, such as setting incentives for healthy behavior like maintaining a regular exercise routine and a healthy diet, are effective ways a company can show agents an appreciation for their well being. However, to create sustainable employee energy, employers need to think beyond these core initiatives and embrace the idea of workplace energy from a broader perspective. Employers need to make sure tasks and shifts are assigned based on each employee's skillset and workload. Treating each agent with respect and sustaining a process of ongoing appreciation can generate high-productivity and positive workforce morale.

At the end of the day, a key driver of whether or not a company is successful in retaining and acquiring customers is its reputation with customers. In today's contact center, customer interactions can take place on several different platforms but each one starts and ends with the agent. In fact, a few Aspect customers who have been successful in motivating their contact centers agents report their average attrition rates to be less than 3 percent, customer service levels increase on average 20-30 percent and operational costs reduce approximately 16 percent. Having a focus and formal process for motivating agents is a business investment that will deliver valuable returns. Companies who are dedicated to this type of encouraging work environment gain loyal customers, who ultimately become company advocates and drive more business back into the organization.

Erik Hagaman is senior product manager for workforce optimization at Aspect Software (www.aspect.com).

Avaya Makes Outbound More Affordable

Avaya this summer came out with a solution called Outbound Contact Express, which caters to what Sarita Fernandes, senior director of product management, describes as an underserved constituency. An affordable premises-based full stack solution designed for ease of use and maintenance, it's aimed at smaller organizations that need to contact lots of customers to collect money, upsell, and/or cross-sell. A 50-agent organization, for example, could for $10,000 get up and running in a day.

Sennheiser Aims to Expand Contact Center Share

Headset solution provider Sennheiser is working to increase its profile in the contact center arena, in which it currently has 5 percent market share. The company is already a big player in the consumer realm, and has had an enterprise and contact center business, but it's now starting to invest more resources in the latter, explains Bill Whearty, vice president of the telecom group at Sennheiser. As a recent Sennheiser press release announces "the company aims to triple its market share with a newly completed portfolio and an increased headcount of sales employees between 2012 and 2018." That includes increasing the number of sales employees by a factor of 10 in its six key markets of U.S., Germany, the U.K., France, the Benelux region and China during that time space. Whearty adds that the company has been expanding its presence in the contact center business over the last decade and notes that it recently introduced unified communications partnerships with such major players as Cisco, Microsoft and Polycom.

NICE to Acquire Causata

NICE Systems has entered an agreement to buy big data analysis outfit Causata, which will enable it to provide greater visibility into a customer's activities on the web and apply the insights from that data in real time, across other touch points such as the contact center. "One of the biggest challenges enterprises face today is the difficulty breaking barriers between the web and assisted-service channels, such as the contact center," said Keith Dawson, principal analyst at Ovum. "In order to truly understand the customer journey and get the most value from that understanding, companies must know what their customers are doing on the web, as they do it. The key is to then share that insight with the sales, services, and marketing organizations, so that they can act in real time to deliver outstanding, personalized customer service and realize more sales opportunities."

Sprint Eliminates Hundreds of Contact Center Positions

Sprint is cutting around 800 customer service jobs nationwide, including nearly 300 in Texas, the company announced in late August. The move is apparently the first major one in a reorganization that began in July, when a majority of the company was purchased by the Japanese telecommunications company SoftBank Corp. TMCnet contributor Tracey E. Schelmetic explains that Sprint says it has seen a decline in the number of calls to customer support centers and call centers, though customer satisfaction is up. The cuts are "organizational adjustments being made to meet the changing needs of our business," Sprint spokeswoman Jennifer Schuler told Bloomberg. Schuler added that Sprint plans to keep its total headcount steady at around 40,000.

Clarabridge Get $80M in New Funding

Customer experience management business Clarabridge has raised $80 million in equity investment from new investors General Catalyst Partners, Summit Partners, and Unica-founder Yuchun Lee. The company provides sentiment and text analytics for Global 1000 organizations including Walmart, Dell, Fidelity, Wendy's International, United Airlines, Best Buy, PetSmart, QVC, Inc., and others. It plans to use the to money to expand its global operations, develop new product, hire new employees, and increase its reach through marketing and strategic transactions. As part of the transaction, Lee becomes Clarabridge's chairman, and Larry Bohn of General Catalyst Partners and Tom Jennings of Summit Partners join as board directors. Sid Banerjee continues as CEO.

Your Identity, For What It's Worth

Your personal identity is worth at least $108. That's the word from James Brehm of Compass Intelligence, who shared that information during the recent ITEXPO Vegas event. Cellular operators recently have changed their terms and conditions to enable them to aggregate customer information and sell it in bulk to third parties, he explained. The next step, he said, will be for them to sell identity information individually. When Brehm asked an executive for the value of an individual's identity information, he said that exec quickly responded $108. Rather than allowing others to sell your information, or offering it up yourself, Brehm suggested that individuals could take that data to the bank. "You yourself can sell that," said Brehm. "You have value. You're worth a whole lot more than you believe you are as an individual."

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SUCCESS

by Paula Bernier

IBC Relays Its Value to Customers, Prospects via Mobile Engagement Platform

Recognizing mobility and personalization are two important trends in communications and customer care, Independence Blue Cross recently embraced them in an effort to engage its customers and attract news ones. And Brian Lobely, vice president of marketing at the health care insurance company, says its timing couldn't be better. That's because individuals can purchase health care reform-eligible products under Obamacare starting Oct. 1.

Independence Blue Cross tapped a company called Relay to help it with mobile engagement. The first challenge this partnership faced was figuring out how IBC could get connected with its customers via their mobile devices, says Matt Gillin, CEO and co-founder of Relay, a platform-as-a-service provider. They decided to use IBC membership cards as way for customers to opt in to mobile communications when they activate their cards.

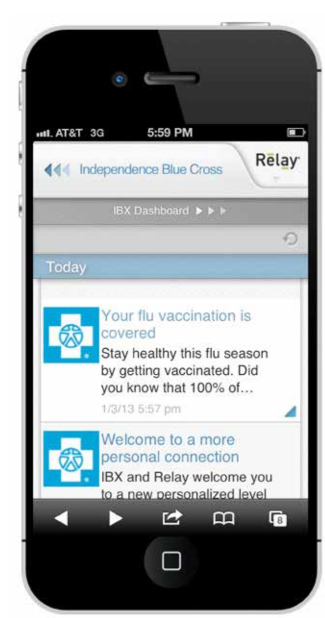
Any successful relationship with a customer starts with connecting with them in a way they want to be connected, says Gillin, yet today most businesses require customers and prospects to come to them for information, and that typically involves overcoming a lot of hurdles – such as waiting on hold, providing information over the phone, and/or locating what they need on a website. The better way is to have a private line between the customer and the company, says Gillen of Relay, which has 18 million users on its platform.

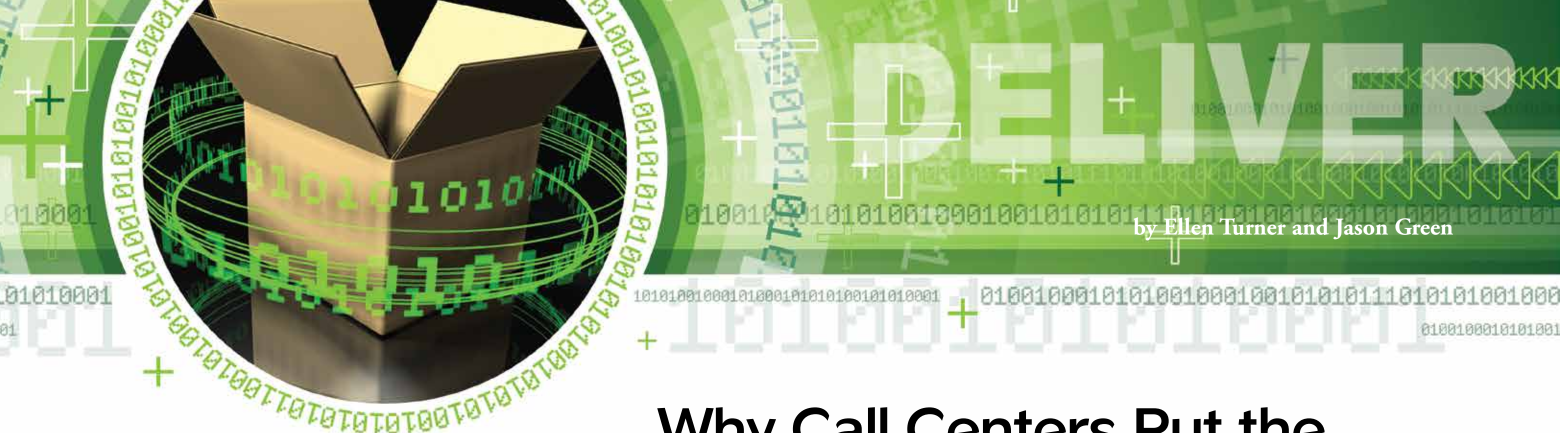
"It's a brand new way of communicating," he says.

IBC initially used the mobile platform solely to deliver explanations of benefits and deliver wellness information to its subscribers. But the company is now evaluating every single piece of information that goes out of the organization and considering whether it makes sense to deliver it via Relay, Lobely says. The next step, he says, is to send IBC subscribers targeted, personalized messages. IBC is also accessing how Relay can help it acquire new customers.

For example, IBC could allow subscribers to invite a circle of friends into a conversation about the new health care rules on IBX Wire, a free, private, personalized message board launched in January for all commercial Blue HMO, PPO, and traditional Blue Cross members, and then push more information to all IBC and non-IBC subscribers in that conversation, says Lobely. There will be a lot of questions in light of the health care reform, notes Gillin, so this will enable IBC to provide education on that and "wow them with that experience."

The end goal, says Lobely, is to get employees already insured through IBC to demand their employers keep IBC as their insurer. There's also the opportunity here to win over new subscribers, possibly including folks who do not currently have health care insurance, Lobely says, adding that the number of health care insurance subscribers will more than triple when the reform goes into effect.





by Ellen Turner and Jason Green

Why Call Centers Put the Bottom Line On Hold

Despite its role as a pivotal customer touch point, experiences with corporate call centers have a bad rap, even among the most valuable customers. While callers generally get what they need, the process frequently leaves them frustrated, sometimes to the point of damaging customer relationships and subtracting from a company's bottom line.

But what if call centers could not only throw off their stigma, but become company profit engines that build rapports and bring in much-needed revenues? It's possible – if companies are willing to make the following changes:

• Develop a deeper understanding of customers and their different needs based on their most critical demands. Let's take, for example, an investment firm that was rated by a mystery shopping agency as one of the very worst call center experiences in its industry. This was after this firm had spent millions to improve its call centers and to train its representatives.

But the firm was surprised to find out it had no real understanding of the different types of customers being served and what they actually wanted. Companies should ask themselves, "What job or set of jobs are they hiring the business to do for them?" The concept may seem obvious, but businesses must collect data that allows them to understand what customers purchase and what criteria different segments use for purchasing. Too few companies actually do this effectively.

• Identify the most attractive customer groups and design call center experiences tailored to them. The aforementioned firm's new and improved call centers treated every customer (or in this case, investor) in the exact same way, making the assumption that all investors should be engaged in its investment portfolio up to a certain level and then trust the firm's financial advisors with the rest of the details. While well intended, this approach only appealed to one small segment of investors, while others felt calls were either too much work or not detailed enough.

It's important for companies to understand and create a unique experience for their various customers. Known, high-value

customers, for example, may want a premium experience that's aligned with their specific expectations. Prospective customers typically need to be quickly assessed to identify the segment they are in, so the company can identify their needs and deliver a customized experience. And customers that are not a value-add for the company might receive the standard call center experience or may be encouraged to go to alternative self-service options online.

• Train the call center to deliver on the new, segmented experience. To better match callers' needs, our sample investment firm implemented a new, segmented approach, whereby three distinctly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different experiences were designed and tested for three very different groups. To do this, the call center defined the customer segments through customer data supplemented with a few focused questions (with prospective customers requiring more questions). Typically, answers from these questions can be arranged in a one-page decision tree diagram for the call center agent to work from or programmed into the script on his or her computer screen.

Then, the trained call center reps took the approach for a test drive. A pilot test allowed reps to practice delivering customized experiences before the program was rolled out more broadly. For a pilot program, companies may offer existing high-value customers VIP treatment to ensure satisfaction; high-value prospects might be transferred to highly skilled reps to garner valuable leads; and lower value customers are typically served effectively without the extras.

When the investment firm recognized the fundamental differences of its customers, it paid off immediately in the pilot program by improving the customer experience and the bottom line. Wi" rates went up significantly among prospective customers; and existing customers found the experience so helpful that the firm started to gain more of their investment dollars and accounts. The pilot program was quickly rolled out across the investment firm. Ultimately, when the mystery shopping agency ranked the new call center experience again, this firm moved from the bottom of the heap to the second best in its industry.

Whether using a simplified approach or a more sophisticated one, companies can make a call center work smarter for their customers and their bottom lines by using these principles effectively. Hopefully, for their sake (and ours), they will make the right call by transforming painful call center experiences into positive ones. M

Ellen Turner and Jason Green are principals at The Cambridge Group (www.thecambridgegroup.com), a growth strategy consulting firm that is part of Nielsen.

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by Andreas Havdrup

The Art of End-to-End Customer Experience Management

No two customers are alike, which is why communication providers must reconsider the traditional one-size-fits-all approach when it comes to tariffs, offers and QoS. The one-size-fits-all strategy had its purpose in building the mobile mass market, but today, customers expect personalization. When they don't get that, it's easier than ever for them to churn, thanks to number portability, the availability of over-the-top services, prepaid MVNOs and the industry-wide trend away from contracts.

When CSPs once offered only a single type of service – voice in the case of telcos and mobile operators, and video in the case of cable operators – there were few differentiation opportunities aside from coverage, number of channels and price. But with mobile data and video, and triple and quadruple plays, CSPs now have far more opportunities to stand out from the pack and compete on something other than the lowest price.

One way CSPs can differentiate the offer is by superior experience. The first step in accomplishing this is to understand the customer experience that they're providing. That's only possible when a CSP has an end-to-end view of its network – including every customer touch point and every business level – all the way out to customer devices.

Just as important, the operator needs access to all of this information in real time so it can act accordingly, such as by identifying and resolving a problem before it becomes noticeable to customers. A tier one North American operator recently implemented a customer experience management solution capable of monitoring more than 190,000 components using 12,000 key indicators. Those insights significantly increased the CSP's ability to catch and fix problems before customers noticed.

Those insights directly benefit the CSP's bottom line in several ways. For example, happier customers mean fewer complaints, higher ARPU and more spending on adjacent offers, so the CSP avoids the unnecessarily high cost of attracting and retaining customers that comes with a poor brand reputation. The CSP also avoids the cost of staffing up its contact centers to field a flood of questions and complaints.

A holistic approach to CEM also enables CSPs to identify and act on segmentation opportunities. For example, many enterprises are willing to pay a premium for certain QoS levels for mobile data and mission-critical services such as video surveillance backhaul.

To capitalize on these kind of opportunities, CSPs need the ability to monitor every aspect of the customer experience in real time. Achieving those insights requires an OSS and BSS that are highly granular, tightly integrated and have the ability to see all the way out to the customer's device, such as a smartphone, tablet or set-top box.

CSPs can take a three-stage approach to CEM:

- Prepare. Understand customer behaviors, needs and wants, and then create offerings tailored to each of those areas; deploy or configure the OSS/BSS to enable those offerings.
- Deliver. Identify the types of services each customer wants and then recommend those during interactions, such as during order negotiation. Be proactive, including advising customers when they're approaching spending or usage limits, and identifying problems before they become noticeable to customers.
- Validate. Measure and analyze how the delivered experience compares to the experience goals. Big data is valuable at this stage.

One fundamental difference between CEM and CRM is that the latter doesn't provide CSPs with experience-related information in real time. CRM's goal is to enable internal efficiencies rather than ensuring a great customer experience. By comparison, CEM focuses on operations and processes as they relate to meeting customer experience goals. Put simply, the customer experience comes first.

CEM also differs from service quality management, which takes a holistic view of a service rather than an individual customer. SQM provides a big picture, near-real-time, end-to-end service-level view of customer-impacting events. The event view includes detailed root cause information based on network counter data such as faults, performance and trouble tickets.

CEM gives CSPs the ability to deliver specific things – promotions, new services, custom tariffs, to name a few possibilities – to individual customers or groups of customers based on information that the OSS/BSS provides. For example, a mobile customer who typically uses a lot of minutes and megabytes travels abroad and stops using her phone is probably a silent roamer, i.e. someone who curtails usage for fear of a big bill. The CSP could configure its OSS/BSS to identify that kind of sudden change and send the customer a text message with a promo for a special roaming plan. That scenario highlights how CEM can drive additional revenue and promote brand loyalty, because now the customer perceives the operator as respecting both budget and the need to stay connected rather than simply trying to nickel and dime at every turn.

A CEM strategy is also a way for CSPs to turn OTT from a threat into an opportunity. Suppose that a broadband provider uses its end-to-end visibility to determine that a significant amount of its customers use an OTT video service. It could then take that information to the OTT provider to broker a partnership. For example, the OTT provider might share revenue with the CSP in exchange for not having its videos count toward the customer's monthly data cap. That makes the OTT provider's service more attractive than rivals that don't have a business arrangement with that CSP.

Advertising is another example. When a CSP has deep insights into customer habits, preferences and location, it has the ability to create advertising-sponsored tariffs. That business model could enable a CSP to pursue highly price-sensitive demographics that otherwise wouldn't be profitable.

It's tempting to view CEM as a way to meet customer expectations, and that's correct. But CEM also enables CSPs to go a step further and offer customers things they don't expect, such as highly personalized bundles, third-party-subsidized tariffs and QoS tiers. In other words, CEM is an opportunity to wow customers with an experience that makes them feel valued and even coddled, and thus loyal to their CSP.

Andreas Havdrup is the head of customer experience management within Ericsson Support Solutions/OSS (www.ericsson.com/oss-bss/).

by James Morehead

Technology Support: The Moment of Truth that Drives Customer Experience

It's remarkable how technology has evolved over the last five to 10 years and how our homes and businesses have become completely dependent on technology.

Take a quick peek inside today's homes and you'll likely see a web of gadgets – from medical monitoring devices to security systems, home automation systems to entertainment consoles, and computers to mobile devices – all reliant on connections to the Internet and each other.

Step into a small business and you're likely to see multiple tablets, smartphones, computers, laptops, wireless printers, VoIP handsets, plus myriad cloud services for business applications and collaboration, all dependent on the Internet.

In many ways, being connected to the Internet has become more critical than electricity, heating, or air conditioning (in fact I'd wager a lot of people today would say they'd rather forego air conditioning on a hot day than lose access to the Internet).

As consumers and small business employees become more dependent on connected technology, they've also been hit with increased complexity. Getting everything set up and working, despite the effort of a lot of companies to make things easier, has arguably become more complicated. As a result, the need for helping consumers and employees get technology up and running is more important than ever.

On top of that, more products and services rely on technology – and therefore technology support – to function and deliver value. For example, consider a home improvement retailer that sells a home automation solution that relies on a connection to a home network being operational to function properly. Does that home improvement retailer support the home network or just hope it works? Does it hang up when the issue lies outside its product or take the extra step of troubleshooting the home network?

Take the case of a video streaming company that streams content for entertainment or for education. The video content it provides is only valuable when the streaming is uninterrupted and the video quality is high. If a customer calls to complain and the issue is with the device, or the home network conflicts with other services using the same home network, who is to blame? Who takes the call and solves the problem? Is a premium charged for technology support that goes beyond the scope of free support?

When we think of technology support 15 to 20 years ago, it was viewed as a necessary evil, with the focus primarily on deflecting calls, minimizing the time spent on the phone with customers, and reducing costs. Customer experience and the impact of technology support on the customer journey wasn't top of mind.

The importance of technology and reliance on Internet connectivity is driving a shift in that thinking. Today, technology support is increasingly being recognized as a critical moment of truth along the customer journey, one that can have a huge (if not disproportionate) impact on the customer experience.

Indeed, according to Parks Associates, network complexity, growth of cloud services, and BYOD will help drive the U.S. market for tech support to a 14.4 percent compound annual growth rate between 2012 and 2016, reaching nearly $25 billion by 2016, while 68 percent of broadband households are interested in technical support services that cater to their devices, including a substantial number also interested in support for the home network router, flat-panel TVs, external hard drives, and game consoles.

Looking more closely at the customer journey, there are two key points in the journey where technology support is a moment of truth. First is the buying experience, covering the first 30 days starting when the customer has walked out of the store, or checked out of an online buy flow. This is most likely where the product will be returned or the service canceled. Today almost every device requires or benefits from a connection to the Internet. The out-of-the-box experience is more complex, and the role of technology support during the buying experience more critical than in the past.

What can companies do to minimize the risk of losing a new customer, or having a product returned? And, equally important, what can companies do to delight their customers during their initial experience with a new product or service?

Second is during the life of the product or service – the ownership experience. The longer a customer uses a product or service the more likely he or she is to have questions, issues or problems. The questions and problems may not be limited to a company's product or service because of the dependence on connections to the Internet and other devices. According to the TSIA's annual Benchmark survey, products are more complex to support than ever (65 percent of those surveyed in 2013 responded that products are "highly complex" to support vs. only 42 percent in 2003).

Those moments of truth are opportunities to enhance, or potentially end, the customer relationship. Adding to the challenges is the ever present and unpredictable impact of social media (the social amplifier), which can quickly cause good and bad tech support experiences to go viral.

So when companies are thinking about technology support, they should think well beyond one-to-one customer interactions, and more about providing a spectrum of support that addresses how their company deals with the many different ways customers can interact with them.

The most intimate (and expensive) form of interaction continues to be interactive live support, primarily over the phone or in person (with chat also increasing in popularity). And while phone-based support still dominates, the full spectrum of support includes do-it-yourself web searches, crowd-sourced social media, and company-managed online forums. The channel people use depends on many factors, but all channels play a role if your company serves a diverse population of consumers. The question isn't which channel to use with your customers, but how to create a seamless experience transitioning from one channel to another.

Companies also need to determine whether they will offer free tech support, premium support (with a broader scope) or both. The demarcation line between free and premium (paid) tech support is a challenging and critical question. For many products and services it isn't economic to provide unlimited tech support (both in number of interactions, and scope of interaction), which has enabled a multi-billion dollar paid tech support market to emerge.

Many companies, particularly in broadband and retail, have launched a combination of free and premium tech support with clearly defined de-marc points between the two models. This allows these companies to take on calls/chat/support requests, deal with the whole problem and not just a subset that they directly control, and do so in a way that is financially viable.

For example, a national retailer that we work with wanted to enhance the buying experience for a new tablet and did so by combining tablet apps for system optimization and security with 30 days of tech support targeted at initial setup of email, Wi-Fi and app purchasing. The new offer was an optional upsell attached to a tablet purchase that enhanced the customer experience while driving new revenue.

In another example, a national broadband service provider wanted a better way to deal with out-of-scope/long tail calls coming into its contact center, versus turning those customers away or addressing the problems in an inconsistent, ad hoc way. To solve this dilemma it created a premium tech support service to handle those calls, which also allowed it to define a de-marc and clear separation between free and premium (paid) calls, increase customer satisfaction, and deliver a new revenue stream.

As customer experience and call center executives look at the customer journey from the perspective of technology support it is important to consider both the buying and ownership experiences, and the delicate balance between free and premium tech support.

The challenge for companies today is to be realistic about the breadth of support necessary with so many devices, equipment and services dependent on connections to the Internet and each other. If you ignore today's reality of interconnected devices, products and services you do so at your own peril, and risk getting blamed for problems you cannot control. If you turn customers away because their issue is outside your current scope of support, you run the risk of a product being returned or a subscriber being lost.

James Morehead is vice president of product management and corporate marketing for Support.com.

High Five

- Assess to what degree you are delivering a consistent, comprehensive and standardized tech support experience, based on feedback from customers, and key metrics driving your contact center.
- Understand where you draw the line between the support you provide that is core to your products or services, and the technologies your products or services rely on.
- How are you dealing with out-of-scope problems today? Is your approach consistent? Are you solving the problem on an ad hoc basis, always turning customers away or missing an opportunity to charge for out-of-scope problems you are solving for free?
- Review the completeness of your technology stack, and ability to support a much broader scope that goes beyond your core service; what is your capacity?
- Fully explore the myriad insource and outsourced options/variations available on the market that can accelerate your ability to deliver a broader scope of technology support.

by Ric Kosiba, Ph.D., Vice President, Bay Bridge Decision Group, Interactive Intelligence, Inc.

Top Tips for Managing the Contact Center Strategy

The world is awash in data. Even "Big Data" is in the news because of its promise. But only through the use of algorithms can we make sense of all this information.

In the contact center in particular, terabytes of operational data are usually available at any given time. When this information is analyzed effectively, it can help contact center management maintain consistent and appropriate service delivery across the seasonal peaks and valleys of contact volumes. Consider for instance that centers have used scheduling algorithms for years to manage the short term, "day of" service delivery. Now, however, new algorithms enable the forecasting, evaluation, and optimization of contact center strategies across seasons and years.

For long-term planning, the use of algorithms and data presents opportunities to prepare more successfully for seasonal fluctuations, changes in operational performance, and changes in contact volume. Consider again that, typically, contact center operations are not stable over medium- and long-term time horizons. It therefore is not unusual for contact volume forecasts to have error rates of over 20 percent a few months out. More so, the resourcing decisions that contact center executives make are not short-term decisions at all. Just look at hiring. Hiring staff is often a long-term decision, and yet many executives often make such judgments in the face of significant forecasting error.

The Importance of Strategic Planning Algorithms

The contact center strategic plan or capacity plan focuses on resourcing the contact center network over the next week to 18 months. A capacity plan is the best big picture decision-

Our Tip:

To evaluate staffing requirements, use validated *predictive* models. To develop optimal hiring, overtime, and controllable shrinkage plans, use *prescriptive* models.

Best Planning Practices

- Avoid spreadsheets for building your capacity plans
- Demand model validation and the best modeling technologies
- Actively manage shrinkage over the long term
- Understand the risk of stretch goals
- Schedule regular meetings to decide

making device for a contact center executive. In many ways, this plan and the resourcing decisions it expresses are the overarching statement of how management wants to treat its customers and agents. This is where customer service executives puts their "money where their mouth is," in that a well-managed and funded strategic plan leads to a well-managed operation. Further, an effective strategic plan is a great aid to achieving wanted customer and agent satisfaction levels.

Which models are best?
Many service failures result from an unmanaged or inefficient plan and could be avoided with proper foresight, analyses, and *algorithms*. Advanced strategic planning systems have mathematical models that both simulate the operational performance under different planning scenarios and develop resourcing plans that are most efficient while still achieving service goals. When variance to the plan is noticed, these simulation and optimization algorithms are key to understanding the trade-offs between service, cost, customer experience, and revenues. These algorithms make plain the service, cost, and experience repercussions of alternative resource decisions, and lead to better informed resourcing decisions.

Simulations are *descriptive* models; they describe how the operation will perform under different agent resource levels or customer contact volumes. Simulation models can be proved accurate through a validation exercise where the model's predictions are compared to historical contact center performance through good service levels and bad. Once validated, descriptive models can be used as *predictive* models of future contact center performance (hint: always insist on model validation for any predictive system). Proving model accuracy gives decision-makers confidence in the analyses that flow from these models. The best simulation models are multichannel (simulates email, back office, inbound, outbound, chat centers), multi-skill, and multisite models. These models are also used to determine staffing "requirements," how many agents are needed week-over-week to ensure service delivery.

The best contact center resourcing algorithms are staffing optimization *prescriptive* models. These models prescribe the best hiring, overtime, undertime, and controllable shrinkage plans that meet servicing objectives at least cost. These models ensure consistent service delivery as they achieve just-in-time staffing plans (as real world constraints allow), never hiring too many or too few contact center agents.

The combination of predictive and prescriptive algorithms let analysts determine the optimal resource plan that will meet service goals at least cost under any expected scenario. This approach produces the "best" management decisions.

Used by a clever analyst, these algorithms will also accurately predict the repercussions and risks of making the wrong resourcing decisions. Given that the future is unknown and variable, a creative analyst can quantify the operational risk of making the wrong staffing decision. These scenarios can be evaluated beforehand. For instance, performing the what-if analysis of what would happen to service if we staffed optimally for today's forecast, but it was wildly off! This analysis could be used to alter the staffing decision and protect from this real-world possibility.

The contact center industry has many cautionary tales of strategic service failures, where wrong resourcing decisions led to service catastrophes and customer experience nightmares that took many months to fix. Avoid these catastrophes with a better strategy for planning.

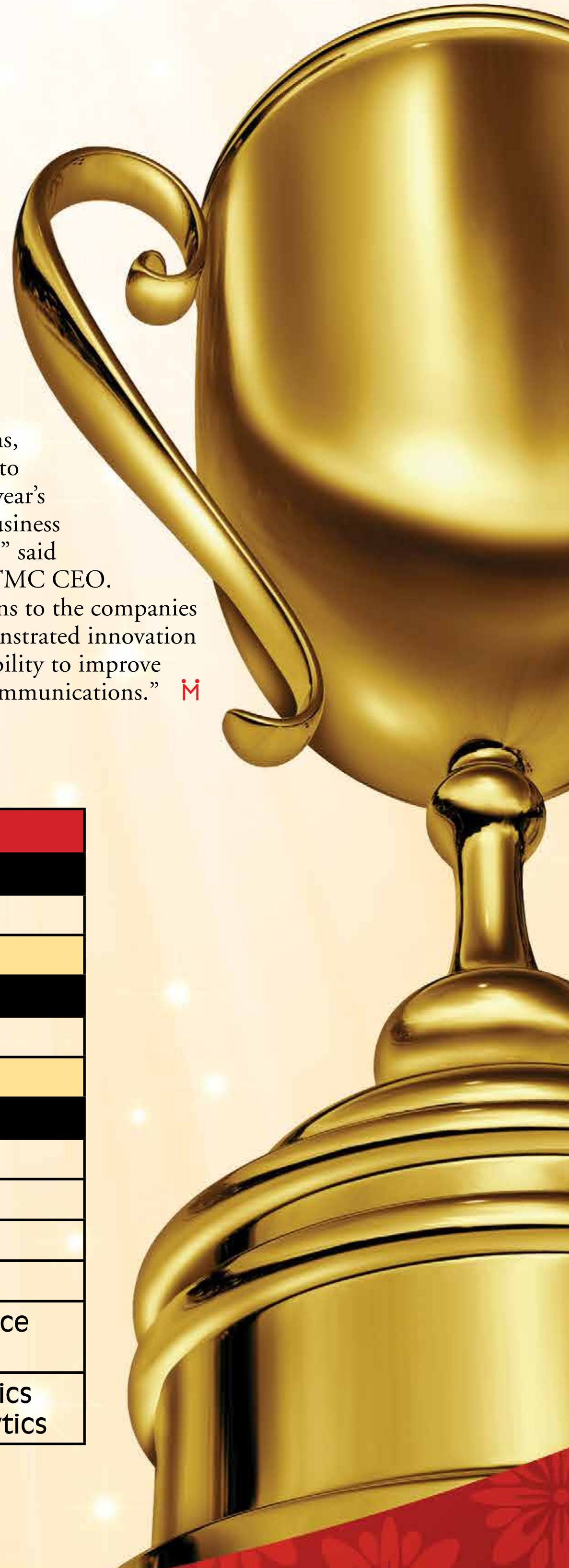
Download the complete whitepaper to learn more:

Top Tips for Managing the Contact Center Strategy
www.inin.com/whitepapers

by Erik Linask

TMC, CUSTOMER Name Social Business Award Winners

CUSTOMER magazine is proud to announce the winners, finalists and honorees of the 2013 TMC's Social Business Award.



The TMC Social Business Award honors vendors that have demonstrated innovation, unique capabilities, and significant contributions toward enabling and improving social channel interactions.

"Using social media, companies have the ability to not only measure and monitor customer satisfaction in real time but to actively participate in the daily dialog that shapes their brand perception. Ultimately social media has an impact on sales and satisfaction levels in the market. To recognize and encourage the evolution and advancement of social communications, TMC is proud to announce this year's TMC Social Business Award winners," said Rich Tehrani, TMC CEO. "Congratulations to the companies that have demonstrated innovation as well as the ability to improve social media communications."

Company	Product
Winner	
salesforce.com	Salesforce Service Cloud
Runner Up	
SoCoCare	SoCoCare
Finalists	
ePath Learning Inc.	ePath Learning eSource
Expert Global Solutions Inc. (EGS)	EGS/APAC Social CRM
LiveOps	LiveOps Engage
Parature Inc.	Parature Social Monitor
Richardson	Richardson Sales Excellence Review
Verint Systems Inc.	Impact 360 Speech Analytics and Impact 360 Text Analytics

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Erik Linask,
Group Editorial Director, TMC

What's in an "S"?

Money makes the world go 'round, or so the saying goes, unless you grew up in the '60s, in which case, it's love, not money. Neither is true. Communication is what makes it all work. Fortunately, we have a tremendous amount of new technology that makes it easy for us to communicate quickly and effectively – welcome to the digital age.

But, I have recently witnessed several instances that have caused me to wonder if the all-digital world we have built is actually creating a communications gap, despite the technological achievements.

I watch children so drawn in by their devices they "forget" to pay attention to their parents, friends, and siblings.

I have seen parents at youth sporting events so focused on their screens (might have been work e-mail or Candy Crush, I'm not sure), they not only missed most of the game, but actually had the nerve to argue over a referee's call when they had their heads buried in apps the whole time.

I've been at corporate dinners, where, as much as I would have loved to engage in conversation with industry colleagues, I couldn't because I had better views of their e-mail inboxes than their own faces.

I've witnessed customer service reps completely inept when having to go off script.

And, of course, when anyone under the age of 30 contacts a friend or colleague (please pardon the possibly gross generalization, but I have to make a distinction somewhere), their fingers naturally gravitate towards IM apps, e-mail, and social media, regardless of the situation.

Please don't misunderstand me. I'm not minimizing the value of digital technology, nor am I suggesting we should avoid technological evolution in ways that will enhance our ability to communicate. There is tremendous value in the capabilities delivered by today's applications and devices, in both personal and professional lives.

I'm simply saying that I fear the injection of digital communications into our lives has the potential to have a detrimental effect on our ability to engage in face-to-face interactions if we aren't careful. In fact, you see it in our digital communications, where, far too often, grammar and courtesy go by the wayside, a trend that is becoming more common in face-to-face interactions as well, IYKWIM.

We have spent countless pages in this magazine discussing the value of social media, the need for social media integration into contact center systems, and the need to have appropriately trained personnel to handle social interactions. The latter is the key, as even in social channels, there are professional and colloquial ways of handling interactions.

When dealing with customers, only the former drives results, which is why it is imperative that as employers, we ensure our team members are well-equipped and properly trained to communicate with customers and colleagues; as employees, we take care in our verbal and visual communications to ensure we are able to do the same; and as parents, we constantly engage our children and challenge them to think outside the LED box.

Technology is a fantastic enabler, and it can enhance our ability to communicate, but only if communicating is already a skillset we own. Mobile devices, instant messaging, e-mail, social media, even voicemail, are all transport mechanisms with the same objective – getting my message to you. That requires that I have the ability to craft that message in a way that ensures you understand, especially if I expect a response or action from you.

Today's world requires, perhaps, a more rigorous educational environment than ever before. Not only must we prepare the future workforce to be technologically savvy, but it can't come at the expense of social skills.

You see, what I mean when I say communication makes the world go round, is that it is not communications, but communication, that drives success. All the technology in the world won't help if we aren't able to formulate logical thoughts and deliver them with an appropriate level of eloquence and professionalism and proper grammar. If you have comments, please feel free to give me a call; I'd love to have a conversation with you.

In the meantime, tell your kids no iPhones at the dinner table (it's a great time to talk about the day); turn off the tablet with Hulu+ running and pick up a book (a real, honest to goodness physical book); stop checking e-mail during your kids' soccer games; and become part of the experience with the other families; and get up from your desk and walk down the hall to discuss items with your colleagues instead of always IMing them (not only does it keep you interpersonal skills honed, but also provides a bit of physical exercise). In short, be human. It will help you develop as a communicator (regardless of what your communications technology of choice is).


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