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# 2011

## Industry Outlook

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Rich Tehrani, CEO, TMC



## 9 Social CRM Tips For 2011

Facebook just overtook Yahoo by a comfortable amount to become the third largest website in the world according to comScore. The world's leading social networking site attracted 648 million unique visitors in November 2010 and this compares to just 630 million for Yahoo.

But you still have no Social CRM strategy?

It is obvious the growth of social networking is not slowing down any time soon and, as more and more commerce is being initiated based upon social network chatter, the need for companies to monitor and participate in these online conversations grows by the day. Yet, with all the growth in the market, social CRM is something most companies aren't focusing on in a concerted way.

Some have Twitter accounts and others have set up LinkedIn and Facebook pages, but social media is driving more sales every day and, in many cases, a single negative and unchecked customer interaction can travel through social networking sites and search engine result pages rapidly, subsequently causing companies to lose large amounts of business.

To improve your social CRM strategy for 2011 consider focusing on and doing the following:

1. **Meet:** Have regular social networking meetings to keep your marketing, product management, branding and executive teams on the same page.
2. **Monitor:** Be sure you are on top of relevant keywords via hashtags and

keyword searches on social networking sites, as well as search engine alerts. Don't forget to focus on your competitors' keywords, as well, to see what the world is saying and determine how you can potentially leverage these comments as a competitive differentiator. Go to [hashtag.org](http://hashtag.org) to learn more.

3. **Measure:** Is your social networking strategy working? Are you being

apologize? Furthermore, did you address what actions you have taken as a result? For example, did you change your return policy? Did you decide to keep the store open longer during the holidays?

5. **Participate:** Be proactive. Share tips, coupons, news and information that could be of interest to your community.

6. **Network:** You will find there are people online who love you and others who hate. Encourage those who love you with direct messages and engage with those who hate you. It is far more difficult to trash a company online if you receive regular and personalized communications from the entity you love to flame.

7. **Integrate:** Get social networking into the arteries of the organization. Determine transparency guidelines and be sure everyone knows how to engage with existing and potential customers.

8. **Dialogue:** Encourage reaction. Try polls and asking questions to get your community to engage with you and your brand.

9. **Don't Over Promote:** Find a balance between objectively educating and engaging with your market without being a 24/7 salesperson. This is a crucial point. **CIS**

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mentioned more or less as time goes on and is the chatter positive or negative? Where is it trending? Why?

4. **React:** What is being said about your company and what are you saying in return? Was a customer unhappy with an experience in your retail store? If so, what are you doing about it? Did you send the angry customer a gift certificate and

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## IN EVERY ISSUE

- |  |  |
|--|--|
| <p>1 <b>Publisher's Outlook</b><br/>By Richard Tehrani, CEO, TMC</p> <p>4 <b>High Priority!</b><br/>By Erik Linask,<br/>Group Editorial Director, TMC</p> <p>8 <b>Customer Interaction News™</b></p> | <p>24 <b>Ask the Experts</b></p> <p>38 <b>The Integrated Marketplace™</b></p> <p>38 <b>Advertising Index</b></p> <p>40 <b>Logout</b><br/>By Brendan Read,<br/>Senior Contributing Editor</p> |
|--|--|

## OTHER ITEMS

- 32 **Case Study**  
Workforce Management That "Flies"

## What's on the Cover



### Presidio Networked Solutions on 2011 Industry Trends

pg 6

## CALL CENTER TECHNOLOGY

- 10 **Hearing (and Heeding) Social Customer Commands**  
By Brendan Read, Senior Contributing Editor

## CRM, BPO & TELESERVICES

- 14 **Applying CRM Ingenuity**  
By Brendan Read, Senior Contributing Editor

## OPERATIONS AND MANAGEMENT

- 26 **From QM to QM**  
By Brendan Read, Senior Contributing Editor

## AWARDS AND RECOGNITION

- 36 **2010 Products of the Year**

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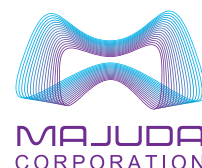
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Erik Linask, *Group Editorial Director, TMC*



## Is Social CRM a Byproduct of Business Ignorance?

**B**usiness success equates to the ability to excel at customer service and at worst, meeting customer expectations while, at best, exceeding them. Of course, in order to accomplish that feat, businesses must be aware of customer expectations, which isn't always as easy as it might seem. But, it certainly seems intuitive that offering the best available products is part of achieving high levels of customer satisfaction.

That means not only in core products or services, but also with ancillary offerings and amenities that help support primary products. For instance, the best auto dealers, in addition to providing excellence on the showroom floor, have also built best-in-class service departments. Favored hotels tend to have upgraded their in-room amenities and offer on-site food and beverage facilities, as well as complimentary breakfast. Wireless operators with the best networks are only as good as the handsets they offer – which is why Verizon has finally partnered with Apple, making the iPhone available to its subscribers, many of whom have been longing for it (read my column in *INTERNET TELEPHONY* to see why I don't necessarily agree with all the Verizon iPhone holdouts).

My question, then, is why would a service provider – whether an ISP, Cable MSO, or traditional carrier – not offer the best possible hardware to its subscribers? I asked this question of Cablevision some time ago, more than a year after I had spoken with Cisco about its acquisition of Scientific-Atlanta and learned of its plans to release networked DVRs. The answer I was given by a rep who, otherwise, provided outstanding service, was less than satisfying: Cablevision doesn't want to have to train its staff on all new technology.

There had to be more to it.

More recently, when I switched to Cablevision's triple play service, I asked a technician who, again, provided stellar support, why the company doesn't offer a cable modem with integrated WiFi, rather than forcing me to connect a wireless router to the cable modem. The answer: the company hopes to be able to sell such ancillary products to its customers. Well, I did buy a new wireless router, a high-end Cisco model with which I am very pleased but, more importantly, I realized that was the end game all along.

Cablevision, while providing high-quality services in its primary product lines, would rather nickel and dime its customers instead of ensuring their loyalty by providing a few key amenities. Why charge for one networked DVR when you can charge for two or three standalone units? Why provide a modem with built-in WiFi, when you can install a basic modem and sell a wireless router on top of that?

For all its talk about standing up for its customers in its battle over carriage fees with News Corp., I remain unconvinced. The company does not have a history of putting its subscribers' interests first.

But, there is a silver lining – for a new and budding market.

What such lack of interest in long-term customer satisfaction, combined with the social media explosion, has created is a new market for Social CRM companies, who are feverishly developing products to integrate social media into CRM systems. Such solution will allow businesses to monitor customer comments – positive or negative – and act accordingly.

While the market is still largely undecided as to how they should approach social media, two things are certain: social media sites are growing and subscribers are voicing their opinions via social media. Consequently, investors are looking closely at Social CRM upstarts, looking for the needle in the haystack that will be the next Salesforce.com. Why? Because most companies have yet to understand that the easiest way to win customer loyalty is not to endanger it in the first place, securing it at the first transaction. Instead, they choose to continue to react to customer sentiment, working from behind to win their allegiance.

In a recent entry on its corporate blog, Assistly, which earlier this year won \$3 million in funding, wrote, "the customer's happiness is the gating factor to... well, everything." Thus, in light of providers' reluctance to truly put the customer first, social media will take on an ever more important role in customer service.

Still, the formula is simple. Running your business on the philosophy of always providing more for your customers than you have to engenders loyalty, even when problems arise. Will it alleviate the need for monitoring social interactions? In today's world, likely not. In fact, regardless of efforts to build satisfaction in the initial stages of a customer relationship, there will always be issues, and social media will remain a key tool for understanding those issues. But, its role in understanding what creates a happy customer is equally important. Indeed, the full power of social CRM will only be realized by businesses that learn to use it for more than reacting to customer complaints. **CIS**



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## Presidio Networked Solutions on 2011 Industry Trends

**T**his is the time of year when we look forward to anticipate to what we think may occur so that we can proactively and reactively respond successfully.

Kevin Parrett is director, contact center at Presidio Networked Solutions ([www.presidio.com](http://www.presidio.com)) which provides unified communications, wireless, security, optical, telepresence, storage, managed and hosted services and supporting networks. He offers his look forward at the contact center trends for 2011 in an interview with Customer Interaction Solutions.

**CIS:** Describe the state of the contact center industry today and going forward. Outline the key trends affecting it and what are the drivers?

**KP:** The contact center business is certainly increasing, but will likely move away from megalithic contact center entities towards integrated business / client interaction service centers. Advancements in wider communications technology have given consumers several choices for how to interact with companies, and so today's contact center technology is evolving to meet these consumer demands by creating ways to communicate back to them.

**CIS:** Discuss the encroachment of ever-more-sophisticated automated voice and online (web, e-mail/SMS) solutions--tools that the new generation of users grew up and are comfortable with--on live agent voice. Will this make contact center reps as rare as building doormen and elevator operators: which





exist only in the toniest buildings, serving the higher-end clientele? What functions—including social media response—do you see contact center staff providing? Which ones will be provided by self-service?

**KP:** The near-term impact of this encroachment is that it will increase the relevance of individuals, and the long term impact is that it will change the meaning of the contact center; however the call/contact center agent is far from extinct. This job is changing and requires a more visible interaction with customers through social media, but the human element has not been replaced. Self-service provides customer satisfaction to the new generation that doesn't want to talk with anyone. This new generation of users wants to get the information they need and they want it immediately. As companies grow more aware of the impact customer service has on the new generation and their tendency of less loyalty, contact center interactions become more important than ever and we will see a more skilled agent workforce as a result.

**CIS:** Which “shore”—onshore, nearshore/offshore and “homeshore”—do you live agent contact centers ending up on and why?

**KP:** This will always be mixed. Many companies who experienced the lower operating costs of offshore call centers have realized the quality of the interactions was poor, resulting in longer average handle time, less first call resolution and more customer satisfaction issues. Some of these companies have already moved their call/contact centers back to the U.S. as a result. This does not mean that offshoring will be dead; it simply means off-shore call centers will adapt and provide a higher quality service in the future.

Homeshoring of agents shows a lot of promise with reduced overhead costs, extensive workforce availability, and higher morale, which for many agents, results from working at home. One way or another, no single “shore” will win. It will always be mixed.

**CIS:** Do you foresee the formal contact center being downsized if not replaced by unified communications linking customers with subject matter experts?

**KP:** What contact centers will inevitably change over time as business needs change. We may see some replacement or downsizing of call centers with unified communications and subject matter experts in some industries, but I do not see this being the case for many verticals.

**CIS:** The next generation is text-driven; they seldom use voice. Does and will this translate into fewer calls to and out of organizations and if so how should they prepare for this shift both with formal and informal contact centers?

**KP:** One would expect more “calls” as data sources become irrelevant, and while we may see some changes in the preferred method of communication, contact centers have already begun

adapting to these changes to provide the same or better levels of service through different mediums (i.e. live online customer service chat sessions). I don't think calls will become obsolete, but I believe consumer preferences will dictate the communication methods that contact centers utilize in the future.

**CIS:** There is a big debate between premise-licensed and cloud/hosted either third-party or OEM platforms for contact center solutions. Suppliers are creating ever-larger all-in-one suites. Third party hosting firms are adding to the array of solutions they are offering to organizations' contact centers. Are the days of premise-licensed products for each function ending or do you see all of these functions being integrated into one platform offered by competing suppliers either for premise-installed or hosted either by these companies or by third parties. And do you see hosted supplanting premises-installed products?

**KP:** Several of our customers have inquired about hosted solutions, but few have actually acted upon them. Although hosted offerings continue to improve by offering closer feature parity to premise solutions and more control to end users, many customers can't get

**“Self-service provides customer satisfaction to the new generation that doesn't want to talk with anyone. This new generation of users wants to get the information they need and they want it immediately.**

**– Kevin Parrett, Presidio Networked Solutions.**

past the idea of their data being exposed to a third party. Third party hosting firms have to provide highly secured solutions to ensure that none of their customers can access other customer information, but the level of trust by end users is not there across all industries. As a result, premise-based solutions will still make up the majority of contact center solutions deployed over the next several years.

There certainly is buzz about moving contact center solutions to a cloud environment, but the question still remains whether contact centers will end up in public or private clouds. With a multitude of regulations contact centers must abide by, it is difficult to rationalize a major shift toward any public clouds in the near future. Premise-based solutions, including private clouds, provide a higher level of control, which is necessary to meet the stringent regulatory compliance demands that are placed upon contact centers today.

**CIS:** Is there a need and a future for outsourcing live agent contact center functions?

**KP:** Outsourcing live agents has allowed companies to scale rapidly without a tremendous investment up front. For seasonal spikes and to meet rapid growth needs, the outsourcing of agents absolutely has a future. **CIS**



### **AltiGen Communications ([www.altigen.com](http://www.altigen.com))**

has released MaxCS Contact Center for Microsoft Lync Server 2010. This new software solution enables a robust Microsoft unified communications solution by delivering ACD, skills-based routing, IVR, call recording and advanced reporting. It supports 5-500 agents and 64 workgroups per application server, virtualization, home/remote agents, and simultaneous logons to multiple work groups. It provides real-time personal and workgroup performance statistics, queue monitoring, CRM integration, workgroup logon/logoff and work-group voice mail. A MaxSupervisor desktop tool permits supervisors to effectively manage their workgroup queues with real-time workgroup and agent performance reporting, silent monitoring, supervisor coaching, barge-in capability and customized queue alerts. There is full-time, centralized call recording for MaxCS Contact Center for Lync workgroup agents.

**Cedar Point Communications ([www.cedarpointcom.com](http://www.cedarpointcom.com))**, recently acquired by Genband ([www.genband.com](http://www.genband.com)) has come out with Enhanced HD Voice, a new technology that is designed to accelerate adoption and marketability of high-definition (HD) voice for service providers. It has released a software upgrade for its SAFARI C(3) Multimedia Switching System that enhances standard voice transmission, enabling business, contact center and residential customers with HD end-points to experience superior call quality.

Because HD calls traditionally have required both the end-points and the network to be HD-capable, it estimates that less than 20 percent – and sometimes as little as one percent – of calls are actually experienced in HD. Enhanced HD's ability to convert standard voice to HD or near-HD quality removes those limitations and enables operators to fully leverage the HD processing capabilities of SAFARI C(3).

**Cisco ([www.cisco.com](http://www.cisco.com))** has rolled out several new products:

- Cisco SocialMiner, which enables companies to find and proactively respond to customers and prospects communicating through public social media networks such as Facebook and Twitter, or other public forums or blogging sites. Status updates, forum posts, or blogs from customers can all be monitored in real time, alerting enterprises of conversations related to their brand. Cisco's social customer care solution enables companies

not only to monitor the social Web to improve business intelligence but also to engage customers that require service

- Cisco Finesse, a collaboration desktop for contact center agents that puts all the information they need in a single, modifiable cockpit, enabling them to help callers faster, better, and with higher accuracy. It can help lower operational costs for businesses and increase the number of satisfied customers
- A new network-based rich media capture platform that supports the recording, playback, live streaming and storage of media, including audio and video, with rich recording metadata. This solution provides an efficient, cost-effective foundation for capturing, preserving, and mining conversations for business intelligence

**HyperQuality ([www.hyperquality.com](http://www.hyperquality.com))** has come out with the ClearMetrix 2.0, an enhanced version of its contact center quality assurance workflow software. It enables enterprise-wide root cause analysis and end-to-end quality process automation, offers configurable reporting and offers an extension of evaluation, calibration and audit capabilities to any authorized personnel in any location with Internet access. It permits sophisticated quality strategies through a Form Design Studio, which supports a wide range of scoring methodologies and flexible structures including conditional logic, weights, penalties, caps, bonuses, floors, auto failures and non-scorable attributes.

**Interactive Intelligence ([www.interactive-intelligence.com](http://www.interactive-intelligence.com))** has released a version of its Customer Interaction Center (CIC) all-in-one IP communications software suite that is designed to work with Microsoft Lync Server 2010. The two systems enable CIC users and Lync Server 2010 users to communicate by phone, or by Lync instant message or video call from within a single interface. Both sets of users receive synchronized presence, along with a common company-wide directory that can be viewed from within the CIC desktop client. Lync works with Microsoft Office and with this, familiar applications such as Microsoft Outlook, Microsoft Word and Microsoft SharePoint.

**InvisibleCRM ([www.invisiblecrm.com](http://www.invisiblecrm.com))** offers the Chatter Provider for Microsoft Outlook Social Connector. This free offering from InvisibleCRM provides users integration



between the real-time Chatter collaboration tool from Salesforce.com and the Microsoft Social Connector, a free Outlook add-in. It adds instant access to Chatter feeds to the library of existing Social Connector Providers, including Facebook, LinkedIn, Myspace and Windows Live Messenger. It can be used to manage lead activities and workload, ensure that status of important support cases is immediately communicated and guarantee that the entire sales team instantly has the most updated opportunity changes. It can also easily disseminate important and urgent company or group communications.

#### **ManageEngine ([www.manageengine.com](http://www.manageengine.com))**

has come out with ServiceDesk Plus Version 8.0, a new ITIL-ready help desk application. ServiceDesk Plus v8.0 features a customizable service catalog, enhanced asset management, automation of common help desk processes and multiple application programming interfaces (APIs). This will enable simplification of interaction processes with third-party products and tighter integration with other ManageEngine software suites. The features added are aimed at increase service delivery speeds and improving user satisfaction levels.

**Nexidia's ([www.nexidia.com](http://www.nexidia.com))** Nexidia Capture and Nexidia Scan solutions have now been integrated with Cisco's new media capture platform, which provides recording, playback, live streaming, and media (audio and video) storage with rich metadata to facilitate easy use. Nexidia brings Cisco customers the ability to create real-time speech alerting applications and the power to perform speech analytics with archived audio. Enabling Nexidia Capture access to the Cisco platform allows calls to be recorded and analyzed by Nexidia's Enterprise Speech Intelligence product suite, bypassing the need to use any legacy call recording applications. Nexidia Scan utilizes the company's patented phonetic indexing and search technology to provide highly accurate and scalable real-time monitoring applications. Notifications can be sent to anyone within the enterprise, enabling more rapid collaboration between different departments.

**Noble Systems Corporation ([www.noblesys.com](http://www.noblesys.com))** has released Noble Workforce Management 2.1.1. New and enhanced capabilities include dynamic agent rankings and real-time adherence reporting based on ac-

tual performance, intelligent forecasting for outbound and inbound and blended contact programs. It also provides what-if scenarios that explore the effects of volume and service level changes and grouping functions to separate agents by skill, exception or other parameters. There is data sharing with the rest of the Noble contact center suite for outbound and inbound statistics including historical data, call volumes, agent details and skills.

**OAISYS ([www.oaisys.com](http://www.oaisys.com))** has come out with the version 6.3 releases of its Talkument and Tracer products, featuring expanded scalability via port capacities having doubled across most platforms and support for multiple Mitel MiTAI Application Programming Interface (API) connections that allows fewer OAISYS recording platforms required to run in a multi-node configuration. A new Targeted Call Recording Archival feature allows customizable staging and purging of call recordings based on identifying information such as account code, extension, caller ID and user-entered data. Enhancements to Tracer's quality reporting functionality include expanded options for creating, sharing and exporting report data. Tracer's employee performance evaluation interface now offers conveniently integrated call recording playback controls and improved flexibility for the creation and handling of evaluation criteria. There is also Automatic Location Identification (ALI) Integration that enables users to search for and retrieve recordings based on ALI-related data, which helps better support the incident-based recording scenarios.

**Satuit Technologies ([www.satuit.com](http://www.satuit.com))** has come out with SatuitCRM v10.11. It has substantially expanded search capabilities and upgraded the technology for rendering search results in universal grid views. New grid view functions provide drag and drop configurations, column locking, dynamic filtering and on-the-fly grouping, as well as many features more typically found in a spreadsheet than in a CRM database. Among other notable new features is a global dashboard administration and publishing suite, which allows Satuit administrators to easily create custom dashboards and push them out to a specific division, group or the entire company. The platform now supports Deep Linking, which facilitates information sharing throughout the organization and expands integration capabilities. Integrated systems can now leverage application layouts and features, not just data, as found in typical Web Service based integrations.



## Hearing (and Heeding) Social Customer Commands

If customers are now the royalty of the marketplace, deciding what, when and how much they will buy – rather than having their wants dictated by advertisers and marketers – social media has become their herald, through which they issue proclamations on what they like and dislike, bellowed and heard throughout the realms. These highnesses take a direct interest in their subjects, including their suppliers, as they should. And they want to be known, respected and be paid due deference.

Those companies that pay heed to the royalties' words and welcome their participation will be bestowed with riches and honors. Woe will befall those who do not listen to or acknowledge their concerns; these procurers will be denounced and banished.

"Customers have been talked 'at' not 'with' by companies and brands for years," explain Denise Meyer, product solutions manager and Jennifer Wilson, product manager, Interactive Intelligence. "As a result, they have become somewhat disconnected from those they do business with and miss the interaction with actual people and the feeling they get from direct recognition."

"Social media gives customers a venue to create relationships virtually. It has therefore altered the [marketplace] balance of power."

### Lowering the drawbridges

Enabling the royal customers' voices to be heard is still easier said than done. Social channel tools are still being developed and refined, along with an understanding of how best to use them. Many companies have not expanded out of the mass marketing mentality; they treat social like the Web, radio, TV and print, as a one-way medium without understanding that social is two-way channel and it is their customers – not them – that dictate the traffic.

"The industry is still in the very early stages of using social media as a customer service method," reports Jorge Blanco, Avaya vice president product marketing, contact center solutions. "What cannot be dismissed is that this method of interaction is rapidly changing how we are communicating."

Social media opens the door to new service and prospecting techniques, among them responding to comments on social



sites and hosting and moderating participatory communities. Applications such as file sharing, ideation, and discussions allow both company participants and community members to contribute to knowledge sharing that can be accessible throughout enterprises, according to Jody Petruzzello, vice president of product at Mzinga. The upsides are stronger customer loyalty and, with it, potentially higher revenues, while reducing customer service and support costs through the communities resolving issues themselves.

Moderating social discussion is key, as it drives conversations to productive results by engaging customers and influencing these interactions to ensure that they are value-added, says Petruzzello. Moderation can take multiple forms but, most commonly, it includes companies monitoring and participating in live, interactive conversations to stay within brand policies, and also empowering community members to report concerns about inappropriate content. On some sites, such as those about or aimed at children, firms can pre-screen or what she calls 'pre-moderation' to avoid exposure to harmful content.

At the same time, social media must be connected to all facets of organizations – not just marketing, but also to sales, billing, shipping and customer service and support, and across multiple



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channels, including voice, e-mail, chat and in-person. Like royalty, customers expect that, when they interact with an outfit, everyone in every office or outlet knows in a couple of clicks who they are and do what it takes quickly to meet their needs. They do not have kind responses to the phrase, "It's not my department."

Unfortunately, that's the case in too many firms. Anand Subramaniam, vice president, worldwide marketing, eGain, points out that businesses have generally yet to fully deliver on the promise of consistently delivered multichannel customer service. He cites a 2010 mystery-shopping benchmark study of 175 leading North American businesses across seven industry sectors, which found that most scored "poor" or "below average" in this experience.

"The last thing businesses would want to do now is create a new, high-visibility silo in social that is disconnected from the rest of the contact center and the overall business," he warns.

Firms also need to be aware that customer royalty can and do abuse their power, just like their kin in their nations' palaces. Subramaniam explains that these despots go social or use the social threat to extract better deals from firms. He recommends dealing with them in a fair, constructive and consistent way that does not hurt one's business, valuable customers or brand, and by taking a consistent and unified approach to customer service. This also enables firms to take explosive social conversations private, into to one-on-one channels for discreet resolution, without losing context.

There is, then, a vital need to sensitize departments – from head offices to engineering/production, from contact centers to field

sales and support – to the impact social media comments can have on the entire organization, Blanco points out. A customer complaint on a Facebook page can light up phone lines or prompt remarks from prospects or customers at sales counters.

One promising route to linking social customers and interactions with their providers is by assigning and attributing values to their social channel behaviors and characteristics. That includes changing the notion of customer value to include social community member engagement and influence, suggests Petruzzello. This is accomplished by identifying the members who are most actively participating in community interactions and those whose content and online behaviors have the most influence on others' participation and contributions.

Another is tweaking CRM applications. Lisa Abbott, senior product marketing manager, Genesys, an Alcatel-Lucent company, advises modifying CRM records to enable customer tracking by Facebook handles or Twitter addresses alone, until these can be associated with specific customer records.

"If a customer who has commented about a firm on social media later calls the contact center, that agent should understand what interaction took place in social media and what the resolution or response was," she says.

### Contact center impacts, and changes

The advent of this social and in-charge customer is forcing changes in how contact centers interact with them.

## B2B, B2C and Nonprofit Social Channel Differences

B2B, B2C and nonprofit organizations have different market and service strategies, which extend into the social realm.

Denise Meyer, product solutions manager, and Jennifer Wilson, product manager, Interactive Intelligence explain:

- Blogs and podcasts work better for B2B brands because they require a certain level of prior knowledge and interest. The effort required to follow them mean the audience already has an interest in the industry.
- B2C brands took an early lead on microblogging (a.k.a. Twitter) as a channel to deliver customer service and as a marketing tool. B2B brands have now started to mirror their success with it. Nonprofits leverage Twitter to spread the word about their latest campaigns to raise funds, and to give their followers a "voice" to further demonstrate support for their cause.
- There are some social networks that are designed specifically for B2B brands (e.g., LinkedIn and Plaxo). Most,

though, are better suited for B2C and nonprofit brands, due to the types of interactions they support, such as interactive games. B2B expectations need to be different. Two-way communication may be slower, or rare, and they will not gather a million fans overnight. B2B brands typically focus efforts based on their business model, whereas B2C brands tend to be less targeted and seek mass followers and fans – whatever expands their base with a much broader target market in mind

- Video sharing sites, such as Vimeo and YouTube, are quickly becoming equally suited for all brands. Yet, considering the types of videos that go "viral" and that it is often used as a success factor, B2C brands may find this channel better suited for them. They often have the flexibility to produce off-the-wall, unexpected videos with mass consumer appeal that serve as campaigns in and of themselves. For B2B brands and nonprofits, this channel is often used to support a campaign, rather than serve as the campaign itself



One of the biggest changes is that firms must dramatically widen their listening frequencies from one-on-one conversations via calls and e-mails to the vast network of social sites. There is a vast amount of information – comments and inputs in social media – that, if not properly filtered and channeled, can overwhelm organizations.

To tune in to the social customer, social media monitoring tools are increasingly becoming more robust and feature-rich. Radian6's monitoring and engagement platform has been enhanced with the ability to process the entire Twitter "Firehose" – 90 million tweets per day – in real time. It also offers proximity search functionality, which enables users to define topics matching keywords based on how close they are to each other in a post, capturing relevant mentions.

Avaya is seeing firms focus their social channel efforts on listening to what customers are saying, filtering conversations, and then converting them to service delivery sessions, so that they can quickly and accurately respond to those elements that can impact one's brand. It has applied these methods in its customer interactions.

"With this approach and the right tools, we are able to use social media to discover new sales opportunities as well as help answer customers' questions on a particular product faster," recounts Blanco. "By listening, filtering and finding out what is needed to resolve a specific situation, we converted them from a dissatisfied to a satisfied customer. That is the power of social media – and the crucial channel it has become for accurately understanding and addressing customer needs quickly."

### Informing the agents

Another critical change is that agents need to know or rapidly find out what is going on in all facets of their organizations, for they are typically the first – and, often, the only – human points of contact, making them virtual concierges or guides.

Genesys' Abbott reports that businesses and consumers are much more educated on issues, having done extensive research, including reviewing social media sites.

"Customers are seeking more advanced responses from agents ASAP, and the typical trite, scripted replies aren't going to work in these situations," Abbott points out. "Agents need to have a holistic view of the policies, products, services and procedures for the entire company. The 'new agents' are akin to guides – they are there to assist customers in the navigation needed to resolve their questions."

With this, organizations need to move to a "heads-up" role from a real-time model of what is happening with customers and, by leveraging analytics, predict what is likely to happen, so they can react and proactively act effectively.

Engaging with the social customer requires training on how to listen and act on comments, including recognizing sentiment

and enthusiasm for brands. Agents (and moderators) must understand what is being said and which messages are really actionable. They must also have the skills to accurately and rapidly respond to them.

When a customer posts on a social media site, 'I hate Firm XXX,' contact centers cannot do much with that, says Abbott. But, if they say 'I hate XXX because I have problems programming the DVR,' the comments become actionable.

The public and immediate nature of social media makes it unique compared to other channels. There is a greater need to ensure responses are well-structured and timely, Abbott points out. Social media has a short shelf life and, for that reason, traditional service level metrics are not sufficient for social media engagements.

"Some companies would say that social media is 24/7 and, depending upon the question or issue, the sentiment and influence of the author or site, that will drive the immediacy of the response," says Abbott.

There are new tools to help organizations and their contact centers enable effective interactions with today's all-important, all-powerful social customers. Genesys' Social Engagement solution monitors popular social sites, utilizes the appropriate analytics to determine messages' actionability and sentiment, while taking into account the authors' influence. Those requiring responses will then be prioritized and managed against service level objectives and routed to the most appropriate resources. Key trends can be discovered through the real-time display and historical reporting of metrics from the social sphere.

The biggest change that is needed to engage with social customers is bringing agents out from the anonymity of their cubicles into the "royal courts" and shifting the focus of their work from getting the customers off the phones and online to build business relationships. Abbott recommends that companies consider, as Wells Fargo has done, creating expert teams, whose members' names and faces appear on their firms' sites.

"Social media about building relationships and that means making sure you are accessible and transparent," she says. "That means giving customers an experience akin to face-to-face, so that you know and can understand their issues on a first-name basis." **CIS**

The following companies participated in the preparation of this article:

**Avaya**  
www.avaya.com

**Genesys (Alcatel-Lucent)**  
www.genesyslabs.com

**eGain**  
www.egain.com

**Interactive Intelligence**  
www.interactive-intelligence.com

**Mzinga**  
www.mzinga.com

**Radian6**  
www.radian6.com



## Applying CRM Ingenuity

Applying effective, versatile ingenious customer relationship management (CRM) strategies and solutions that deliver high ROI has never been more critical than today.

A slow economy has made the ability of CRM to focus resources on the most profitable customers extremely vital. At the same time, rapidly growing use by customers and users of mobile and social channels demands that CRM methods and tools embrace them. Yet, budgets are tight, as are the timelines, to demonstrate ROI.

Customer Interaction Solutions interviewed several leading firms and asked them questions on: the key trends are they seeing in CRM demand and applications as well as the solutions they have delivered or will be delivering in response to these trends?

Here are the highlights of their answers. Complete articles on these firms and others can be found on TMCnet.com.

### Consona ([www.consona.com](http://www.consona.com))

#### Tim Hines, Vice President, Product Management

Due to the economic conditions, budgets have stayed flat or increased only incrementally in accordance with employees' cost of living, so investments in CRM are also relatively flat. Where companies are making investments is in replacement technologies or solutions that result in cheaper means, or in investments that are designed to reduce costs. We are seeing a lot of activity in knowledge management, as well as interest in chat, e-mail response management, and in other solutions that facilitate interaction with customers on a cheaper basis.

I do see an increased desire to understand the payback and ROI, though not necessarily to get an accelerated view. I've found that some companies that made investments in the past didn't do a good job of understanding the benefit – not just in terms of dollars, but the entire return on their investments. So, now they're very interested in having a clearer picture of what their return is going to be.

Organizations are [increasingly] looking at modular solutions, and when they are making investments, they're interested in doing that via a subscription-based or hosted solution. There are challenges,



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advantages, and disadvantages to using a SaaS or hosted model, some of a technical nature, some related to security and reliability, and some financial. However, the SaaS phenomenon has evolved from early-adopter phase to mainstream in CRM, and a whole set of companies that would not have even considered a SaaS option 18 months ago is now looking into its merits. That is a big deal.

Our bread and butter is saving our customers' money and this is the approach that guides our product roadmaps. That said, we are focused on emphasizing mobility and wireless clients for all of our products. We've based this objective on direct feedback from our customers and it features heavily in all of our near-term plans.

As of yet, we have not heard a lot of call for social features, so it's not necessarily a big driver in customer desire at this point, but we are integrating it into our products nonetheless. At a recent member consortium, social features and customer communities were the main focus of discussions. Our customers are saying they're looking to make an investment in them. To me, that says further down the road, perhaps in 2012.

**Microsoft Dynamics ([www.microsoft.com/dynamics](http://www.microsoft.com/dynamics))**  
**Chad Hamblin, Group Product Manager,**  
**Microsoft Dynamics CRM**

The first trend is a focus on total cost of ownership (TCO). Gone are days where large CRM vendors could justify exorbitant and costly CRM projects. Organizations today want value and they realize it is worth more than software costs. It includes costs associated with hardware, training, consulting, customization, integration and maintenance. As part of that, companies are also looking for ways to leverage existing technology investments in conjunction with CRM.

Another major trend that relates to the focus on productivity and TCO is the emphasis on choice. We often hear from prospects, customers and partners how having flexibility in deployment options and overall choices in how to operate their businesses are a top benefit. The bottom line is they all want choice in delivery models (on-demand, on-premises, partner hosted), in access options (Native Outlook Client, Web-browser, mobile device access) and choice in who they partner with, and they want choice in pricing and licensing terms.

While on-demand CRM solutions currently do not make up the majority of the CRM market, it is certainly the fastest growing area. With the desire to minimize IT costs and quickly implement CRM projects, many organizations are turning to SaaS-based CRM solutions.

We are seeing a premium being placed on analytics and data visualization. People are increasingly asking to visualize data in real time, directly within dashboards, reports and goals or key performance indicators (KPIs). They need the ability to take data and derive actionable insight from it.

The other key trends we are seeing are mobile and social. With the advancement of mobile technology and the need to improve productivity, many organizations are looking for mobile solutions and, specifically, mobile support for CRM solutions. In regards to social media, while many CRM vendors and customers are still trying to figure out how it relates to their CRM projects, one thing that can't be questioned is its impact in general. Social media has shifted the balance of the power from businesses to consumers and given them a free and ubiquitous platform to voice their opinions.



## Eight Steps to CRM Shopping

Ready to buy a CRM solution but want to make you're going to acquire the right one? Soffront ([www.soffront.com](http://www.soffront.com)) offers these eight steps:

1. Have a clear understanding of your business needs. This is often the hardest part of finding the right CRM solution. Document the business problems that must be resolved by your CRM, and verify that the system you've chosen will actually address these issues.
2. Your business strategy may change over time. This requires flexibility in CRM, allowing for the system to be fine-tuned easily with built-in tools and without external consultants.
3. No solution will be able to cater to all of your requirements right out of the box. Figure out the gap and figure out the cost of bridging that gap.
4. Consider the user friendliness of the CRM solution. It's easy to confuse colorful, attractive user interfaces with friendliness. Don't be fooled – true user friendliness is about how convenient and efficient the solution is to use. This can be easily evaluated by counting the number of clicks, steps, or drilldowns are needed to accomplish simple tasks, which could otherwise be performed using spreadsheets or other office automation software. This is critical, since a business solution should never become an operating problem for users.
5. Understand the scalability and reliability of the CRM software to accommodate your growing business.
6. Check for availability of services like customer support and professional services, in case you need help in the future.
7. If you are using "implementation partners" to implement your CRM, make sure your CRM vendor is also responsible for successful implementation.
8. Understand the pricing and evaluate benefits versus cost. The best solution may not always be the most costly.

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We have come out with Microsoft Dynamics CRM 2011 that has more than 500 enhancements. This release coincides with our worldwide launch of our on-demand offering, Microsoft Dynamics CRM Online, which will be released in 40 markets and 41 languages.

Microsoft Dynamics CRM 2011 introduces a completely new streamlined user interface (UI) that provides a contextual ribbon, record pinning and most recently used list capabilities, along with other enhancements that help users find information they need, while minimizing clicks and windows. We have also included a wealth of personalization features, like role-based forms, personal views and drag-and-drop customization, which help organizations tailor CRM for their unique business needs and present data to the individual needs of each user.

We have added new analysis capabilities, including allowing organizations to create, view and configure real-time dashboards; there is a new feature called "Inline Visualization" that allows users to instantly create charts and visualizations of their data. We are also supplying new performance management features, like goal management, business auditing and field-level security, to allow organizations to better track performance, identify inefficiencies and improve operations.

We are providing a wealth of new features that allow organizations to better leverage existing technology investments. These include seamless data export/import to/from Excel, the ability for CRM users to apply Outlook conditional formatting rules against CRM data and the ability to create Outlook reminders on records.

We are also including a wide variety of capabilities that allow organizations to better connect with people, systems and sites. One is a new "Connections" feature that allows organizations to more effectively track non-traditional roles and the "Social Connector," which is also part of Outlook 2010, which allows CRM users to provide social context to their contacts by surfacing data from Facebook, LinkedIn and other key social sites.

#### **SAP ([www.sap.com](http://www.sap.com))**

**Reza Soudagar, Senior Director,  
CRM Solution Marketing**

There is fierce competition amongst companies in order to maintain or increase their share of the wallet. At the same time, budgets have been cut and customers are more and more value conscious. This has put tremendous pressure on companies to differentiate themselves. Some have slashed prices, but smarter companies have doubled their focus on customers and are using customer insight to modify their products and services to be more relevant. These companies are also enhancing their customer service capabilities to differentiate themselves from their competitors and deliver additional value.

The rapid adoption of social networking technologies is definitely changing the way companies and customers interact; it has also changed the balance of power in favor of the customers. Some

## **A CRM Innovation Sampler**

Here is just a sample of some of the other new CRM products and enhancements released in the past 12 months (others can be found on TMCnet.com):

**Avidian Technologies' ([www.avidian.com](http://www.avidian.com))** Prophet 5 Ultimate Edition extends Prophet's existing opportunity tracking capabilities from the sales force to contact center customer service and support and to fulfillment and client services. Prophet Ultimate allows each department to create their own customer record templates. Each template can be further customized with over 100 user-defined fields.

**LeadMaster ([www.leadmaster.com](http://www.leadmaster.com))** Lead-Xpress is a lead management solution that provides access to the CRM through email without having to login to the CRM, which saves money on cloud/hosted CRM tools as they charge per user. With Lead-Xpress, managers can send leads and requests for updates to accounts or leads directly from the LeadMaster system to the sales reps via a built-in email function. The emails contain links to simple forms that are linked to the CRM so they can update the status of the accounts or leads.

**Pegasystems' ([www.pegasystems.com](http://www.pegasystems.com))** CRM offering, Customer Process Manager, can now monitor key social media sites to intercept and proactively respond to customer communications before they become service problems. It has enhanced role-based portals increase the productivity of agents and reps who are utilizing multiple customer contact channels. Improved content authoring enables creating and presenting critical content to end users in context, regardless of the repository in which the content resides.

**Jigsaw for Salesforce CRM ([www.salesforce.com](http://www.salesforce.com))** is a new crowd-sourced business data service. With it, users can be alerted to updates in contacts received via Salesforce's Chatter collaboration, feed and messaging tool. Contact centers, marketers and sales reps can instantly know when business contact data degrades or becomes bad. Integrated Salesforce CRM reports with Jigsaw data to determine if records related to future sales are incorrect or incomplete.

**Update Software ([www.update.com](http://www.update.com))** has launched the COSMIC (Comprehensive Observation of Social Media Integrated with CRM) module. It constantly browses Twitter entries and RSS feeds in search of pre-defined words and terms, and then analyzes the search results. It also enables firms participate in discussions that are important for them. COSMIC can be used for market research and managing relationships with opinion leaders on social networking sites.



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companies have not understood this change and are struggling, while others have embraced this change and are transforming themselves to become part of the social networks of their customers and build the one-to-many relationships. Traditionally, companies relied on the data from one-to-one interactions with their customers to make decisions. Today, many conversations about products or companies are happening outside the four walls of the enterprise. People are discovering defects and finding solutions or workarounds by relying on their social networks and online communities. A bad customer experience could be easily shared and broadcast around the globe instantly via Twitter.

Visionary organizations are taking a strategic approach to their CRM programs while looking for quick value. They have a clear roadmap with KPIs and business objectives, they revisit their roadmaps and objectives regularly and make adjustments, and they also choose technology platforms that not only can deliver value quickly but are flexible and expandable to support their overall visions.

To support this imperative, we have introduced SAP CRM rapid deployment edition. This is a quick, low risk, economical way for companies to implement essential CRM capabilities in six to eight weeks. We deliver the software and the implementation services at a fixed cost and fixed time frame. Customers can always turn on more modules and capabilities in a later phase if required. This is a clear advantage that we offer over CRM point solutions. Typically, you can deploy a point solution relatively quickly, either in-house or via a SaaS model, but these systems are hard to expand to meet future requirements and make subsequent value delivery longer and harder.

We have also delivered prepackaged Twitter integration with SAP CRM through SAP professional services. We and Sybase have begun offering the Sybase Mobile Sales for SAP CRM. Through this solution, customers can rapidly deploy our sales solution to their sales forces using iPhones or BlackBerry devices.

#### **SugarCRM ([www.sugarcrm.com](http://www.sugarcrm.com))**

##### **Clint Oram, Co-Founder**

More companies are discovering the need for CRM. More importantly, they are learning that, thanks to open and cloud-based solu-

tions like SugarCRM, they can actually afford to deploy a robust CRM initiative. This may be an effect of the global economy, as more organizations around the world are seeing the value of enhancing customer relationships, as it has proven that retaining customers yields greater profits than simply attaining new customers.

Social media and mobile are definitely top trends in CRM and, in many ways, are related. Customers want to interact with companies wherever, whenever and mobile devices are a large channel to do that. In a more B2B scenario, sales and support need to have access to critical data at any time and place. In addition, mobile CRM needs to be fully customizable in order to link to social media and location-based tools to optimize the user experience. When organizations research mobile CRM options, they should be careful that the tools are not too rigid and ensure they are truly mobile platforms that can support any number of customizations and data sources to be consumed in a mobile format.

The availability of cloud-based and more open, flexible CRM tools are making deployments more immediate, and we are seeing that in our customer deployments. Also, companies have learned from past mistakes and are deploying CRM in more phased approaches – taking it one step at a time, seeing quick wins and insuring strong adoption before going to the next level. This had led to a higher return on investment versus older “boil the ocean” large-scale CRM deployments.

We have added 13 new supported languages and multiple currency support to the Sugar platform. Secondly, more and more companies are demanding mobile solutions, mainly because their employees are demanding anytime, anywhere access to their critical data. We have unveiled a total mobile strategy, starting with full iPhone and iPad support, and will be making more announcements around Sugar Mobile in 2011. On the social side, we have added a new Twitter Connector that complements the LinkedIn Connector – which gives CRM users easier methods of monitoring and utilizing data and connections in their social networks. We will be adding a lot more social collaboration capabilities both in the product and through partners in 2011. **CIS**



## **Non-Profit Versus For-Profit CRM**

CRM solutions are attractive to nonprofits for the same customer value-maximizing reasons as for profit-making organizations. But, should they buy off-the-shelf tools?

John Stockton is vice president, product management, Convio ([www.convio.com](http://www.convio.com)), which provides non-profit-focused solutions, including CRM. He points out that, for most nonprofits, the organization provides services or programs to one group, yet seeks others to fund the mission and volunteer and advocate for it. The CRM

needs of nonprofits are greater than those of some corporations because the variety of the relationships and needs are much greater than just a corporation's relationships with its customers.

“Nonprofits’ constituents have varied reasons for giving, and not understanding those relationships can mean losing their support,” Stockton points out. “Thus, simply adapting a commercial CRM system that’s not designed for nonprofit fundraising, volunteerism, advocacy and programs will not effectively support the needs of a modern nonprofit.”

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## Hosted Versus On-Premises Contact Center Solutions

In today's contact center solutions marketplace contact centers have a choice between hosted and premise-licensed delivery. This has naturally raised several important questions that must be answered so that the right method for the right product is selected that best meets your contact center needs. Roe Jones, Product Manager, Interactive Intelligence, takes a hard look at some of these issues.

**Q:** Compare the benefits and the challenges of hosted and premises-installed solutions.

**RJ:** Benefits of hosted solutions include lower up-front capital expenditure and "pay-as-you-go" pricing models;

ization, and fewer concerns about security and reliability. It's important to note, however, that over the last couple of years, hosted solution vendors have made great strides in these areas.

For instance, Interactive Intelligence has addressed security, reliability and application control concerns by offering a unique local control VoIP delivery model that enables customers to keep all voice traffic on their networks and record and store all recordings inside their firewalls. Interactive Intelligence also offers scalable server virtualization architecture that provides dedicated servers for increased security, reliability, and application control. Of course, Interactive Intelligence always recommends that buyers conduct a thorough audit of a vendor's hosted facility (both the infrastructure and policies) to ensure maximum security and redundancy.

**Q:** Outline the advantages and downsides of OEM-hosted versus third-party hosted solutions

**RJ:** The advantages of OEM-hosted over third-party solutions are greater flexibility (bug fixes, new features, migration

**A potential downside of using an OEM-hosted solution might be lack of vendor experience in hosting applications. However, this will vary significantly, so a thorough evaluation of a vendor's hosting track record is recommended – particularly access to hosted customer references.**

easy to provision multiple sites and remote agents; reduced IT maintenance and management costs; faster application deployment and access to upgrades; and flexible scalability to quickly adjust capacity as business needs change. Challenges of hosted solutions include less control over applications, and security and reliability concerns.

Benefits and challenges of premises-based solutions tend to mirror the flip-side of hosted benefits and challenges. Specifically, premises-based benefits tend to be maximum control over applications with a high degree of application custom-

to premise-based solution, etc.); lower costs by eliminating a third party; and simplified vendor sourcing and management, again, by eliminating a third party. A potential downside of using an OEM-hosted solution might be lack of vendor experience in hosting applications. However, this will vary significantly, so a thorough evaluation of a vendor's hosting track record is recommended – particularly access to hosted customer references.

**Q:** What technology applications are best suited for hosting and which ones should be premises-installed? Why?

**RJ:** Today, virtually all contact center applications can be delivered as hosted solutions. These include CRM, sales force automation, help desk/tech support, and the traditional contact center features such as IVR, ACD, screen-pop, monitoring/recording, reporting, etc. One consideration for hosting, however, is the degree of application customization and complexity required. For highly customized application needs, a premises-based solution might be better. In addition, should the customer want to eventually migrate from a hosted to a premises-based solution, many vendor solutions will require a complete re-write of applications. Interactive Intelligence recommends that buyers ask if a hosted-to-premises migration is even possible and, if so, what potential application re-writes will be required. If the hosted vendor also offers premises-based solutions, and if they also function as the OEM, then odds are good that this migration is possible with no impact on applications.

**Q:** For what contact center functions and for what size contact centers and organizations are hosted solutions ideal? Which ones should consider having their solutions delivered on-premises?

**RJ:** Hosted solutions make the most sense for customers with any of the following requirements: Short deployment timeframe; minimal capital expenditure; flexible purchasing model that accommodates spikes in interaction volume; cost-effective disaster recovery and business continuity (premises-based buyers can also deploy a DR-only hosted solution); and multi-location and teleworker support.

Some criteria that may make a premises-based solution more desirable are organizations that have very strict regulatory and compliance requirements. In some cases hosted solutions will not meet the needs of organizations that require highly customized applications. Finally, though hosted vendors are rapidly adding sophisticated applications to their offerings, some may still not exist via this delivery model. For instance, business process automation will be difficult, if not impossible, to find via a hosted model due to the degree of integration, customization and complexity required.

In terms of size, many industry analysts report that larger hosted deployments are already beginning to outpace SMB

deployments and they expect this trend to continue. This is understandable given that hosted vendors are addressing the reliability and security concerns that are most prevalent among very large organizations. In addition, while cost is a main hosted driver among SMBs, for larger organizations the breadth and depth of applications is a key driver. Many hosted vendors now offer very sophisticated applications for both contact center agents and business users. **CIS**

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## From QM to QM

In contact centers, “QM” is beginning to take on a whole new meaning, expanding from quality monitoring to include quality management.

As organizations recognize that contact centers are central to their core functions of serving and retaining customers’ or users’ support, whether financial, internal or for government entities, they need to ensure their performance is best in class.

In an era of limited resources, where productivity is paramount, and of the “social customer,” where individuals’ raves or rants to the world can shine or tarnish and make or break brands and reputations, whether fairly or unfairly, every action or comment by contact center agents has to be dead-on. There are few tolerances for missed opportunities, misunderstandings and missteps.

QM, then, is no longer about keeping agents alert and checking to see if they are complying with regulations and standards. It is also now about ensuring they are meeting or exceeding the individual needs and expectations of customers. That means there must be an emphasis on customer satisfaction, retention and sales and revenues. It also means reducing agent and supervisor churn, resulting in lower costs and increased income and support thanks to building the experiences of quality motivated staff.

Brynn Palmer, a principal in solutions marketing for Verint, has seen a change in the contact center and in-person dialogue from the traditional, “is there anything else we can help you with?” to quality models that incorporate acknowledging the length of time of the customer relationship. These methods capture customer feedback and ensure



that customers are familiar with all available channels so they are serviced “in the manner they wish to be served.”

### Enabling the quality shift

Driving this shift is a growing realization by organizations that they need to integrate customer satisfaction and quality within one holistic quality management strategy to effectively serve and retain customers. Nina Kawalek, ceo, RCCSP Professional Education Alliance points out. Too often, high agent quality monitoring scores do not necessarily mean or translate into customer satisfaction and retention.

“This disconnect between quality and satisfaction can create real problems for contact centers, who are faced with the dilemma of, ‘Why are my customers unsatisfied with our service when our call quality is high?’” warns Kawalek.

Propelling this expansion is the adoption and application of speech or, more accurately, interaction analytics, to identify revenue/cost-impacting calls or e-mails that require coaching. These include cross-selling and up-selling, as well as minimizing escalated or repeat calls, as opposed to randomly picking out contacts.

Patrick Botz, vice president of workforce optimization at VPI, reports that powerful new desktop analytics-driven quality monitoring solutions now exist that can tag important events and data directly from employees’ desktop screen applications, such as CRM, ERP, collections, e-mail and Web chat applications, to recorded interactions without any extensive back-end integration work. They also enable automated classification, analysis and actions centered on key business issues.



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He is seeing firms adopt a blended approach, conducting focused quality assurance on key issues and opportunities while applying the statistical validity of random sampling.

“By focusing on what you are monitoring for, you’re still presented with a random sampling and are able to grade agents on how they handle customer complaints, but you have goals in mind,” Botz points out. “While agents may say, for example ‘you’re grading all my worst calls,’ their employers may respond that they want to see how all agents handle their worst calls to reduce the number of calls and complaints, with the objective of improving customer and agent satisfaction.”

Analytics tools enable organizations identify and promote successful behaviors through picking out key words and phrases used by high-performing agents.

Managers often ask, “If I can find out what makes this

“Not being in compliance with some of these standards can result in fines that the contact center customers certainly want to avoid,” warns Krucek.

### **QM/Feedback integration**

To integrate quality and customer satisfaction, organizations are beginning to recognize that what they hear in the interactions must be in sync with what they are asking on the customer feedback forms. If they are not, a breakdown occurs. Agents may not be aware of compliance-related questions or even create unique ways to sell or message products and services.

Firms are now reviewing the feedback questions to ensure there are direct correlations to what agents are being monitored for, such as professionalism and courtesy that directly correlate to agents’ soft skills, which are being monitored for by coaches and supervisors via forms.

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**To integrate quality and customer satisfaction, organizations are beginning to recognize that what they hear in the interactions must be in sync with what they are asking on the customer feedback forms.**

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person a good salesperson or what makes that individual great with customers, then how do I turn this around and package it to send it to other employees and make them just like my star performers?” says Matt Storm, director, Americas marketing at NICE. “In the past, that task had been done through coaching. The function is now being shifted to QM via evaluating the words and phrases and what they are doing and modeling those through root cause analysis and speech analytics.”

These analytics tools, applied to QM, can bolster attraction and retention strategies by identifying customers who are very satisfied and those who are unhappy and who may defect and when, reports Kristyn Emenecker, vice president, solutions marketing, Verint. With this information, organizations can reach out to them to reinforce and retain their loyalty.

It’s not that quality monitoring for its original reasons, such as compliance, has faded away. Kathy Krucek, product manager, Aspect says her firm is seeing an increased need for compliance recording and security features related to encryption that prevent recording/storing sensitive data such as payment card information. There are increasingly stringent standards protecting such information.

Storm suggests one of the first ways to insure this relationship is to ask, “Why is this important for the customer?” for each question. This definition should be shared with the teams and outlined in the centers’ definition guides or calibration sessions. Answering this question conveys relevance to employees and supports the overall objective of increasing customer satisfaction.

Verint’s Emenecker and Palmer point out that synching QM and customer feedback can be a technical challenge. These internal and external assessments are frequently housed in separate, siloed systems and are not easily merged to illuminate both sides of a single encounter. Yet, it is an obstacle that can be overcome – Verint accomplished this with a prior version of its Impact 360 software, released in 2008.

One can sync too tightly, though, by not allowing customers to comment on feedback forms on matters others than those for which agents are being monitored.

“Often, customers provide feedback in those surveys about the companies as a whole, about brand, process and other facets that are not part of that specific call or agent,” says Emenecker. “Firms then need to have question sets on surveys that tie back into the calls as well as free-form



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comments that they can apply analytics to get additional customer intelligence and insight.”

Calabrio has come out with Calabrio One, which provides an integrated set of quality-enabling applications: recording, quality management, workforce optimization, and analytics. In it, the Calabrio Quality Management 8.0 product supplies evaluation form enhancements, including adjustable question-level weighting, hints and flexible editing options and enhanced configurable and graphical reports for performance management.

Aspect Quality Management provides integrated Web-based surveys. Based on customer-defined criteria, rules are evaluated for which calls should trigger survey invitations for online surveys to be sent to callers via e-mail.

Survey results are then posted back to the QM application for ease of comparison with internal evaluations.

“Some of the benefits of surveying customers include having immediate feedback specific to a transaction – agent quality and process – as well as insight into products and services offered by the company,” reports Krucek. “There are challenges with this. They include response rates (i.e., customers being willing to take the time to complete the survey). They also include getting feedback across a variety of scenarios, not just getting bad feedback when something has gone wrong or only getting great feedback if something went very well. Getting ‘average’ customer responses can often be very useful in gauging the typical experience.”

### QM for social media

If contact centers are just now getting used to performing QM on chat, e-mail and SMS, as well as voice, now they are being faced with monitoring and managing social media interactions. Social media requires careful monitoring, in that the agents are acting as spokespeople (it is media after all) with no “do-overs.” Furthermore, such interactions often happen in real time, especially if there are urgent issues, such as major service complaints by customers who have many followers. So far though, contact centers are taking a passive role to social media, with little direct engagement and interaction, as opposed to voice or e-mail activity.

“What we’ve seen, up to this point, are our clients’ agents responding to tweets or Facebook posts with something back along the lines of, ‘Thanks very much, if you have any questions give us a call or send an e-mail,’” says Storm. “It is not, at this moment, a direct line of communication.

“Once those interactions start to take shape, where you have customer service and support and sales employees monitoring and handling them with social media, you will need to monitor and link them in the same way we can link a





phone, e-mail or click-to-chat conversation,” he adds. “In this fashion, companies will have a complete and integrated view of customer interactions, regardless of channel, in real time.”

Verint’s Palmer has seen social media driving interest and growth in the older text forms. As a result of look at monitoring social media, organizations have also begun reviewing the other, more traditional ways customers communicate.

She is also seeing firms set up specialized social media response teams that have been equipped on the back end to apply QM principles and practices. QM teams are using combined speech and text analytics tools to examine and combine customer data from what she terms “direct” (i.e., voice, chat and e-mail) and “indirect” (i.e., social media) sources, to gain a 360-degree view of the customer experience down to the individual level. This method assists organizations in fixing broken processes, identifying issues and opportunities, gaining competitive advantage, driving down costs, and being proactive about reputation issues before they go “viral.”

“There are plenty of companies that were not prepared when there was a process breakdown and customers went onto Facebook or

are not monitoring beyond the agents are failing to implement a comprehensive quality management strategy. This encompasses everyone in the call center, not just the agents. Centers should also take it a step further by applying QM to the quality assurance department and monitors.”

VPI’s Botz says coaches’ and supervisors’ performance can be assessed directly by tracking the number of hours each supervisor spends coaching, and monitoring the productivity in performing QM evaluations per agent and per time period, plus monitor QM rating objectivity and consistency. They can also be evaluated indirectly by measuring outcomes of their efforts, reflected in metrics that track business performance of the supervisors’ teams. Supervisor ratings that are based on business outcomes provide insights into their effectiveness and interpersonal skills, such as the ability to encourage the right agent behavior and to provide constructive and objective feedback that effects positive changes in call center agent performance.

For direct assessment of supervisor/coaching competency, rating forms can be developed to evaluate knowledge of departmental products, services, systems, processes and procedures,

**“There are plenty of companies that were not prepared when there was a process breakdown and customers went onto Facebook or YouTube to vent their frustration. Delayed responses in these situations can erode a brand image virtually overnight.”**

– Brynn Palmer, Verint

YouTube to vent their frustration,” says Palmer. “Delayed responses in these situations can erode a brand image virtually overnight.”

### Coaching the Coaches

As contact centers migrate from a quality monitoring to a quality management approach, supervisors’ roles have been evolving. Traditionally, they have spent a great deal of time troubleshooting and running interference with other business units resolving customer requests, according to Palmer. Analytics technology now provides the type of customer intelligence that, in the past, required significant supervisor man hours to research, as well as a method for sharing findings and results across enterprises. Supervisors are now in a position to move from ‘firefighting mode’ (e.g., identifying and acting on specific problems) to professionally developing their agents.

At the same time, there is a growing emphasis on applying QM to coaches and supervisors to ensure centers’ continuous improvement. Indeed, front line staff are only as good as those assisting and directing them.

“The ‘quality monitoring is just for the agents’ myth needs to be dispelled,” says RCCSP’s Kawalek. “Call centers that

training systems, contact center communication systems. They can also assess initiatives in training contributions and identifying trends in reports, and making suggestions for operational and product improvements.

“Improved contact center performance is a function of overall improvement in the performance of all participants – agents, supervisors, quality evaluators, coaches, and other employees – that is to be reflected in specific desirable outcomes,” says Botz. **CS**

The following companies participated in the preparation of this article:

**Aspect**  
www.aspect.com

**Calabrio**  
www.calabrio.com

**NICE**  
www.nice.com

**RCCSP Professional Education Alliance**  
www.the-resource-center.com

**Verint**  
www.verint.com

**VPI**  
www.vpi-corp.com



## Workforce Management That “Flies”

**S**cheduling contact center agents can be compared to scheduling flights. Too few at peak periods or the wrong aircraft assigned can lead to frustrated patrons – who may go to competitors – while too many will waste scarce resources.

Delta Air Lines knows the challenges of meeting both types of schedules extremely well. It is the third largest U.S.-based air carrier, serving over 470 destinations in 105 countries. It serves its customers through 15 contact centers that employ 8,500 full- and part-time agents.

One of the Delta units is its Reservation and Sales Organization (RSO). Unsatisfied with the “Trust us – Our schedules are optimal” corporate claims, it carried out a study to generate and compare schedules generated by the traditional workforce management (WFM) systems available in the market in the past. Disappointing results in schedule efficiency levels from this study led the RSO, in collaboration with Delta Technolo-

higher schedule efficiency levels.

Even so, the Delta RSO wanted to fly higher. Continued interest in improving schedule efficiency and service levels prompted it to invite ac2 Solutions ([www.ac2solutions.com](http://www.ac2solutions.com)) to participate in a six-month study, facing off against solutions from competing firms.

ac2 proposed that Delta trial the AWO Optimal Scheduler. The software uses ac2’s proprietary mathematical optimization models and algorithms for concurrent optimal scheduling to determine the total costs and scheduled agent time for the schedules with the highest schedule efficiency attainable in a contact center environment.

With the AWO technology, work and off days, daily start times, break times are optimized for all agents concurrently, according to tour group and shift template parameters – and agent and skills availability – to meet performance targets for forecast contact volumes and handling times. This eliminates significant schedule inefficiencies created by the incremental heuristic approach used by the other WFM software schedul-



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“Our selection team agreed that ac2 Solutions’ AWO Portal was... providing by far the highest schedule efficiency and functionality available on the market today.”

– Steve Scheper, Delta vice president, reservation sales.

The Delta RSO developed a plan to benchmark the agent scheduling capabilities of participating solutions over a target week for the division, consisting of:

- Six contact centers in three time zones
- Two environments (work areas)
- 918 full-time and 151 part-time agents
- Two skill groups and skills-based routing

Using the same contact center data, weekly agent schedules for the two environments were generated by the AWO Optimal Scheduler and the other WFM software participating in the study, including Delta’s proprietary scheduling technologies. Schedules generated by different WFM systems were checked by the RSO for conformance to weekly tour, daily shift and break scheduling parameters, agent and skills availability, and operating hours.

The AWO Optimal Scheduler showed a remarkable advantage and improvement opportunities in all metrics used over other WFM software, including the proprietary technologies used by the Delta RSO, reports ac2 president Dr. Turgut Aykin. Major benefits realized included:

- 12 percent savings in schedule costs
- 98.5 percent schedule efficiency

- 73 percent reduction in excess agent time
- 100 percent elimination of agent shortages
- Even distribution of percentage Agent-on-Duty time into each interval

Schedules generated by the AWO Optimal Scheduler distributed agent-on-duty time in to each interval by even percentage, another requirement of Reservations and Sales to avoid substantially higher shortages over weekends generated by the other WFM software that participated in the study.

Delta adopted the AWO Scheduler after this study. It also recently rolled out the AWO Forecaster and AWO Capacity Planner. Using the data driven benchmarking approach, Delta Air Lines developed a road map for increasing efficiencies that impact both service levels and bottom line.

“Our selection team agreed that ac2 Solutions’ AWO Portal was... providing by far the highest schedule efficiency and functionality available on the market today,” says Steve Scheper, Delta vice president reservation sales.

“The AWO Optimal Scheduler showed a remarkable advantage and improvement opportunities in all metrics used over the other WFM software including the proprietary technologies used by Delta Reservations and Sales,” says Dr. Aykin. **CIS**

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## Customer Interaction Solutions' 2010 Product of the Year Awards

In the first issue of each new year, Customer Interaction Solutions dedicates a section to the suppliers that have shown a dedication to delivering products and solutions that enable businesses, governments, institutions and charities/nonprofits to become more attentive to their customers and users: and to provide higher levels of customer service than ever before.



This year's CIS Product of the Year winners are no exception. They represent an ever increasing range of products that help their purchasers and users deliver an enhanced customer experience. Representing the best in the industry, these firms have demonstrated a devotion to excellence and the further advancement of the call/contact center and CRM industries through their innovative products and services. The editorial staff of Customer Interaction Solutions selected companies to receive the esteemed Product of the Year Awards based on their vision, leadership and diligence.

"Customer Interaction Solutions has recognized the most ground-breaking products for 13 years through this prestigious award honoring the most deserving companies," said Rich Tehrani, CEO, TMC. "We are proud to honor the greatest achievements in the advancement of call centers, CRM and teleservices technologies in 2010. These companies have proven their dedication to quality in solutions that benefit the customers' overall experience as well as ROI for companies that use them." **CIS**

Here are the 2010 CIS Product of the Year winners:

**ac2 Solutions**

*Advanced Workforce Optimization Portal*

**Alloy Software**

*Alloy Navigator 6*

**Alorica, Inc.**

*Alorica Analytics  
Helix by Alorica*

**Angel**

*Angel 4*

**APEX Voice Communications**

*APEX First Touch Self-Service Optimizer*

**Aplicor**

*Aplicor Cloud Suite 7*

**Autonomy**

*Autonomy Explore*

**Bomgar**

*Bomgar Appliance*

**CallCopy**

*cc: Discover*

**Cicero**

*Cicero XM Discovery*

**Clear G2**

*C2CRM*

**Confirmit**

*Confirmit Horizons*

**Contactual**

*Contactual Multichannel Connect for  
Salesforce CRM*

**Coveo**

*Coveo Customer Information  
Access Solutions*

**Cross Country Automotive Services**

*Advanced Location Spotting*

**Cyara Solutions**

*Cyara Platform v3.7*

**CyberTech International**

*CyberTech Recording Solutions*

**eGain Communications**

*eGain Social Experience Suite*

**Enkata**

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*ePath Learning ASAP*

**Epicor Software**

*Epicor Express*

**Five9**

*Five9 Virtual Call Center Release 8*

**FrontRange Solutions**

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**KANA Software**

*KANA SEM*

**Knoa Software Knoa Virtual/  
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*KnoahSoft Harmony*

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*UC for Business Contact Center*

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**NetSuite**

*NetSuite CRM+*

**NICE Systems**

*NICE SmartCenter*

**Noble Systems Corporation**

*Noble Harmony*

**Nuance Communications**

*Nuance On Demand Hosting Solutions*

**OAISYS**

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**OpenSpan**

*Release 4.5*

**Parature**

*Parature Customer Service*

**Pegasystems**

*Customer Process Manager*

**Plum Voice**

*QuickFuse by Plum Voice*

**PlusOne Communications**

*Nautilus*

**prairieFyre Software**

*prairieFyre Contact Center for*

*Microsoft Lync*

**Presence Technology**

*Presence All-In-One Suite*

**Richardson**

*Sales Call Planner*

**RingCube Technologies**

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**Siemens Enterprise Communications**

*OpenScape Contact Center V8*

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**SugarCRM**

*Sugar 6*

**Sykes Enterprises**

*Online Support Communities*

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**TOA Technologies**

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**Toshiba America Information Systems,  
Telecommunication Systems Division**

*Toshiba Strata Call Manager*

**Transera Communications**

*Transera Scorecard Routing*

**UTOPY**

*UTOPY SpeechMiner*

**VanillaSoft**

*VanillaSoft (SaaS offering)*

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<i>www.ac2solutions.com</i>	
Call Center Software Community .....	5
<i>http://call-center-software.tmcnet.com</i>	
Call Recording Community .....	33
<i>http://call-recording.tmcnet.com</i>	
Contact Center Solutions Community .....	15
<i>http://callcenterinfo.tmcnet.com</i>	
CosmoCom.....	25
<i>www.cosmocom.com</i>	
InContact.....	11
<i>www.incontact.com</i>	
Interactive Intelligence .....	Cover 3
<i>www.interactive-intelligence.com</i>	
Infocision .....	Cover 2
<i>www.infocision.com</i>	

Jabra.....	17
<i>www.jabra.com/Avaya</i>	
Majuda .....	3
<i>www.majuda.com</i>	
OpenSpan .....	19
<i>www.openspan.com</i>	
Outbound Call Center Community .....	39
<i>http://outbound-call-center.tmcnet.com</i>	
R.L. Bencin & Associates .....	38
<i>www.rlbencin.com</i>	
Satmap .....	21
<i>www.satmaptrg.com</i>	
Thomas L. Cardella Associates .....	38
<i>www.tlcassociates.com</i>	
VXi .....	27
<i>www.vxicorp.com/v100testdrive</i>	

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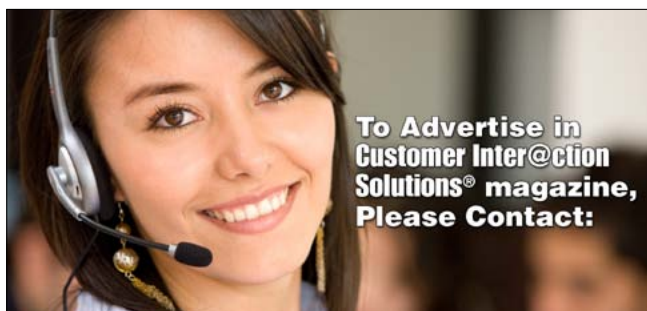
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## To Improve Quality and Profits Get Rid of “HR”

One of the numbers in the combination that unlocks the door to customers and their spending – the others include effective marketing and supplying the right products at the right price – is the hiring, retaining and properly managing problem-solving-empowered top quality contact center agents and supervisors. They generate superior performance, both in higher profits and lower costs.

Yet, why do all too many organizations get it wrong, resulting in poor service, substandard sales and high and costly turnover?

The answer lies in “HR”: not just human resources departments, but in the corporate “cost-center” resource mentality, where employees are merely material to be sourced, self-transported, sifted, processed, used and, when finished, discarded.

This is reflected in the traditional method of hiring: selecting and jamming the irregular shapes known as people into specific molds that are too often designed to meet uniform (i.e., low) standards of convenience, rather than to effectively accomplish the intended work. Applicants are put on invisible conveyor belts, automatically screened and tested, interviewed by HR staff and, only then, do they get to meet the people they would be working with and with and be exposed to the conditions in which they will be working. All too often, hiring professionals have told me, descriptions of the work being advertised do not meet what the work entails. Knowing that, it’s no wonder agents frequently leave or are let go, for all too often, these “products” do not meet their “users” needs.

One of the worst kept secrets in the contact center industry is that it, like the auto industry, is based on “planned obsolescence.” In this instance, too many firms’ business models informally count on employees leaving after X months to avoid paying benefits, higher wages and refresher training costs. These outfits know from experience that most staff will not stay long; they will become fed up with the boring, stressful, inflexible, dead-end and low-status work and go elsewhere.

Contact centers, via their site selection partners, can forecast labor market churn and negotiate building leases – and taxpayer-funded goodies from employment-desperate governments – around this expected depletion of readily tapped agent and supervisor “resources.” They calculate that, with a tough economy and the specter of offshoring, employees will endure wretched conditions, which keeps costs low and maximizes ROI.

It is part of the same cynical cost calculation that eschews quality for price in products and services.

Here’s the problem with this approach, one that only the smart outfits are realizing: Processing and spewing out staff no longer pays, any more than doing likewise on goods and services sold to customers.

Why? Because customers will no longer tolerate sullen, mishired, questionably competent, rigidly scripted and/or badly trained and supervised agents and poorly supplied overpriced items. Instead, they will tell the world via social media, which risks sales and profits going to the competition at the speed of light.

Customers will also check out, again, via social media, what employees have to say anonymously about their employers and wares they offer to get the inside scoop on what is going on before opening their wallets. They know that quality is impacted by how workers feel about the firms that hire them.

The lesson is this: Outfits that treat their employees as disposable broadcast that their products are likewise and will find themselves fit to be treated in the same fashion.

By the same token, those firms and contact centers that focus on total quality – in customer service through hiring and treating staff as worthwhile individuals – as well as delivering well-made, right-priced products and services, will be rewarded handsomely by customers. They are the ones that, for example, involve managers in setting criteria and job descriptions and expose prospective agents to contact centers and managers early on. The smart outfits have limited HR to what it does best: checking new employee credentials and informing them of pay, benefits and corporate procedures.

If bad news travels fast, the raves of fans – with the heartfelt support of employees – move faster and, with them, greater returns to organizations’ bottom lines. **CIS**

# 2011: What Every Contact Center Should Know, and How to Plan for It

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Principal Analyst  
Forrester Research



**Joe Staples**  
Senior Vice President  
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# Poor Service Levels, High Staffing Costs?

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- Special event day forecasting
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##### Staffing & Scheduling

- **Poor schedule efficiency** using non-optimal heuristic scheduling
- Inaccurate Erlang C or primitive simulation based staffing and service level predictions for skills-based routing

- **5 – 12+% agent headcount savings over other WFM to meet the service level targets**
- Concurrent Optimal Scheduling of all agents' work/off days, daily start and break times together
- Provably optimal schedule efficiency
- Sophisticated Discrete Event simulation for staffing and service level predictions for skills-based routing

##### Strategic Planning

- **Third-party add-on using different forecasting, staffing and scheduling models than the WFM software**

- **Comprehensive, integrated strategic planning using advanced forecasting, staffing and scheduling models**
- Sophisticated What-If analysis capabilities
- Productivity and AHT changes in new agent training/ramping
- Planning all agent and support staff groups
- Vendor SLA and capacity planning

##### Performance Management

- **Limited to passive reporting with no decision support**
- Real-time Adherence

- **Proactive performance optimization, scorecards and dashboards with advanced decision support tools**
- Real-time Adherence

##### Agent Workstation

- **Limited or no support for agents to manage their activities over the internet**

- **Easy-to-use web-based workstation**
- Exception entry
- Shift swapping
- Schedule and vacation bidding
- Performance review

##### Software Architecture

- **Outdated client-server architecture**

- **%100 web based**