

Call Center Times

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IP-enabled Contact Routing Applications Bridge the Gap Between CRM and the Contact Center

By Joseph McFadden, Vice President, Marketing, Intervoice

IP opens the door to integrating technologies that satisfy customers' desire for choice when contacting a company. In turn, the company can be more efficient when responding to customer contacts. IP-enabled systems for Contact Routing Management (CRM) seamlessly integrate with Customer Relationship Management (CRM) for efficient handling of each contact.

It's by design that there is play on the CRM acronym to emphasize the point that the integration of traditional customer relationship applications with new software-only contact routing applications is integral to the next evolution for an improved customer experience.

Today's customers have choices in how they wish to engage with a company — immediate assistance, deferred assistance, and engaging with the company via self-service. Yet companies struggle to manage multiple, customer service models. The immediate assistance service model is typically delivered by live agents, but can also be delivered via web chat and immediately escalated emails. Deferred assistance is typically

provided by live agents responding to emails and voice messages, although automated routing applications remove the live agent from the process. Self-service is typically delivered over the web in the form of knowledge base information or over the phone via an IVR.

The degree to which these service models are integrated determines how intelligently and cost-effectively a company responds to a customer. These service models usually are designed around proprietary hardware and software solutions in a silo fashion with little to zero integration. The inefficiency of the silo architectural design and the cost of integrating these service models with proprietary hardware are often prohibitive, therefore seldom considered. Today's customer routing management software applications leverage IP technology to integrate all three service models into a single consolidated software application on the corporate data network.

IP enables these models to be integrated with CRM to automate the routing and prioritization of customers based on customer information in the

CRM database. Today's IP-based customer routing management applications are software-only architectures, making the integration with CRM applications be at a fraction of the cost and deployment time as traditional CTI deployments for database access, routing, and screen pop.


There are several compelling reasons for companies to deploy customer routing software applications:

Prioritize and route customer contacts based on customer need, customer value to the business, and resource availability. The integrated service models allow every customer contact to be evaluated based on the history and relationship with the company. Companies can respond immediately to highest valued or highest priority customers regardless of how they chose to contact the company (phone, e-mail, or web). Any business value in any database can be used to determine the priority of a customer.

Provide a more flexible model that allows you to intelligently choose when to escalate the contact based on customer need and value to the business. Without the integration

of service models with CRM information, it is often the type of service model that the customer chooses that dictates the level of service the customer receives. If a customer phones a company, then that live, person-to-person call would be deemed more important than an email. However, an email arriving at the same time as a call may be from a higher valued customer. The value of the customer to the company is not part of the routing/queuing criterion unless the customer's CRM information is integrated with the service models. With the integration, a customer email, which typically is handled as a deferred contact, can be escalated and handled immediately by a live agent if the contact is recognized as 'high value'.

Service customers consistent with your goals to reduce operational costs while exceeding customer expectations. As companies attempt to drive customers to self-service the challenge is to drive the right customers to self-service and identify those that require deferred or immediate assistance. Driving

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all customers to self-service without regard for the customer's need or value to the company heightens the risk of losing the loyalty of some customers.

Reduce the cost of managing multiple customer service models.

Companies rely on reports generated by service models (phone, email, web) for making current and future business decisions and improvements. However, today's separate silo operations and systems for phone, email, and web applications require separate system administration which equates to separate reports. Consolidating, comparing and analyzing reports can be time consuming, un-manageable and costly. The latest customer routing software applications require a single administration tool and provide consolidated reporting across all service models so business decisions and improvements can be made quickly and cost effectively.

Improve the return on your CRM investment.

Leading industry analysts report that less than 30% of large call centers deploy productivity applications such as data directed call routing and screen pop at the agent desktop. The reason for such a low rate is the prohibitive cost of deploying these applications. Only the larger centers can afford the expense of CTI hardware, CTI middleware, and professional service fees for complex and lengthy projects. The latest customer routing software

applications integrate easily with CRM applications. Typical deployments for screen pop, as an example, are done within a day or two. And by eliminating the cost barrier to CTI deployments, companies can more widely deploy CTI to multiple databases applications.

It's about the software

Unlike legacy ACD systems that rely on expensive, proprietary switches, the latest contact routing applications are software-only, IP-enabled architectures that can tightly integrate with other applications important to the customer experience and reduction of costs in the call center.

Traditional customer contact routing or handling applications (ACD, IVR, etc) have been built around a vertical solution approach. This model resulted in the current infrastructure for contact centers: a layer of telephony based switching components sitting on the telephony network; a layer of data applications (CRM, e-mail, chat, etc.) sitting on the data network; a layer of CTI hardware and middleware that integrates voice and data components. This third layer also required lots of care in the form of expensive CTI professional services in order to deploy applications.

The new horizontal software-only model for contact centers is a model more familiar to IT professionals. This simplified model allows companies to leverage a common hardware

platform for all enterprise applications, typically based on low-cost generic servers. The network infrastructure, or layer, relies on the company's IP data network. In the case of the contact center, both voice and data are carried over this single network. The software layer sits on top of the network layer and is based on a set of industry standards (VXML, XML, VoIP, SIP, SOAP, ODBC) adopted by vendors to support interoperability and to support faster deployment. And finally, the application layer, call routing and queuing, IVR, self-service applications, web chat, etc., are built around these standards. This new software-only model for customer routing delivers general deployment benefits as well as specific call center benefits.

With the rapid adoption of IP technology in the enterprise, today's contact centers are able to be more customer centric than ever before. Software-only, IP-based contact center systems are setting a new level of customer service. Customers no longer have limited choices for contacting a company. Contact centers can now customize each customer service experience to meet customer service expectations. And companies can now meet or exceed customer service and operation performance goals.

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(From) Return to Profitability ...

Your path to turn your service and support call center into a customer-centric profit center

By Sam Bloomfield and Amit Shankardass
ClientLogic Corporation

... Achieving the full profit potential of each customer relationship should be the fundamental goal of every business. The logic is as simple as it is compelling: Profits from customer relationships are the lifeblood of all businesses. And, at the most basic level, these profits can be increased in only three ways: by acquiring new customers, by enhancing the profitability of existing customers, and by extending the duration of customer relationships. Today companies can use information and technology tools to link their investments in customer relationships to the returns that customers generate.

In other words, companies can now optimize the value exchange: the relationship between a company's financial investment in customer relationships and the return that customers generate in responding to that investment ...

– Alan W.H. Grant, Leonard A. Schlesinger, Harvard Business Review

The conventional transaction-



based contact center is going the way of the pay phone: fast disappearing. Whereas the age of the wireless rage has made coin-operated telecommunications virtually non-existent, the contact center is shedding its black-and-white, Q-and-A service platform in favor of more vibrant offerings, ones that present greater opportunities for both the consumer and the producer. This movement involves using technological and human resources to better understand and service the customer and, in turn, to measure the return on the investment companies are making in their customers. In essence, the concept of the “value exchange” – published more than a decade ago – is now rooted in the contact center, where one phone call, one e-mail, one chat session can lead to significant, potentially long-term, value for all of the principals involved.

Take the case of a leading retailer of consumer goods. A handsome Web site and colorful catalogs mark its brand, and a loyal customer base identifies with the supreme quality of the company’s products, yet once upon a time the retailer barely knew its customers at all. That veil was removed when the company made a significant investment in a customer relationship management (CRM) application through its third-party customer care provider. The application provides a view of the customer across all channels and product lines, and ensures that every customer interaction is tracked into a centralized database and presented to the contact center agent via a universal desktop. Why this investment? To provide more effective customer interactions (improved customer experience), information for better customer analytics (measure of customer

return), and the opportunity to mine customer information (increased return on customer investment).

As a result of building this customer repository, the retailer is able to determine the buying habits, characteristics and associated spend for each customer. Using classical customer segmentation methodology, customers are segmented based on their economic relationship with the company – both current and potential. Subsequently, the company determines the appropriate investments to best serve each customer segment. For example, for the most avid consumers, the objective is retention and not upselling/cross-selling.

This company epitomizes the return on customer investment concept. While there have been several successful initiatives to

reduce cost and increase revenue, every one of them was measured against the expected return in terms of customer experience, satisfaction and, therefore, loyalty and spend.

Shifting Market Dynamics – from Customer Cost to Customer Growth

The service-dominated contact center increasingly is being recognized not only as a key channel for customer service and technical support, but also for creating and delivering value to clients through full-sales/service customer interactions. Companies are not satisfied with just reducing costs anymore; they expect to utilize this powerful channel for customer communication to improve the return on the investment they make in the call center to deliver service.

Customer service and technical support activities are often



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outsourced to third parties so that organizations can lower operating/administrative costs, acquire special capabilities/expertise and reduce longer-term capital investment.

Companies that outsource are wise to understand the evolution of the client/provider relationship that all too often is viewed only in tactical terms: the contact center channel as a way to reduce cost to service. This is typically only measured by traditional metrics such as “average handle time” or “first call resolution.” Customer-centric metrics, which take an integrated approach to satisfied customer interactions, enable us to better understand customer behavior. Enabling truly effective customer relationships can deliver superior economic results if the right relationship interactions, aided by the right human and information resources, are allowed to occur and flourish.

Outsourcing can be about creating greater value than is already present in many customer relationships. This value is extracted through greater targeted channel investments in areas with the potential to pay dividends in terms of retention, loyalty and additional sales. One has to view the channel as holding greater customer potential by mining the growth opportunities that are explicit or implicit in deep relationships with profitable customers.

By focusing on strategic investments in the most productive areas, drivers of return and key channel processes, companies can derive greater value from the contact center.

What is Return on Customer Investment?

Profitability is a function of the relationship between cost and revenue, and return is the larger-picture economic benefit derived from the overall investments made in the phone channel. Reducing cost or increasing revenue each appear to be compelling objectives, but in fact they may lead to undesirable outcomes, such as loss of customers, or even short-term unprofitable operations. Reducing cost alone, when it affects customer interaction quality and the customer experience, which can damage customer relationships and hence loyalty and sales, is of course not desirable. Increasing revenue at too high a cost, by, for example, over-investing in the sales process will not result in a profitable outcome either. Determining what is the “right” cost and what is the “right” corresponding relationship to revenue is embodied in the return calculation.

Most contact centers are perceived as only committed to reducing costs/increasing revenue, therefore missing the opportunity to think at a more

strategic level, and also address an area that is of ultimate concern to corporate management and its constituents – ways to increase shareholder value.

An exclusively tactical approach to the contact center function, as defined by measuring cost, revenue and retention, could result in an erosion and marginalization of the ability and the perception that the contact center deliver no more than a commodity service that is available everywhere. Contact centers must not only meet clients’ needs and expectations with regard to return on their investments, but they must use this refocused attention to encourage the creation of greater value from the contact center channel overall. When companies realize that greater value and return is inherent in the channel their investments will begin to increase.

When we speak of improving return we refer to both the company and its customer investments. Ultimately the customer provides the reason and revenue to drive all of the client’s activity.

Drivers for Return on Customer Investment

To better understand this concept, one should examine the essential drivers of cost, revenue and return and their interrelation.

Cost

In order to realize revenue from products and services most non-commoditized organizations must invest in building a brand with customers, acquiring new customers and servicing all customers. Investments in brand and marketing acquisition are made because of the expectation of direct immediate revenue or its short-term potential. The costs associated with service are typically viewed differently. Most organizations view the cost of service as, at best, an indirect investment, and it is perceived generally as “a cost of doing business.” Across most industries the typical organization has no, or low, expectations for deriving true channel value by delivering customer service or technical support. Costs are not viewed as investments, but as economic factors that must be minimized either through live agent interaction restrictions or automated solutions. There is no expectation that the service contact center can provide organizations with profitable customer relationship building.

Revenue

The expected outcome of brand and acquisition investments is new profitable customer relationships. Organizations make these investments because they expect and can see direct results of their investments. Contact center service is only beginning to be viewed as



providing direct revenue potential, because it has traditionally been perceived to provide little direct revenue opportunity.

Not all customers that companies have are profitable, and not all service interactions will result in direct revenue. But the ability to see where opportunities exist is what transforms the channel from a cost center, to a cost neutral business process, or even to a profit center. Organizations are also looking at how differential investment in customer segments opens up new possibilities of revenue and return, which were not considered when the decision to provide service was initially made. The ability to implement these new approaches to customer interactions takes dynamic technology and people skills that must be constantly evaluated and updated to reflect the current state of each individual customer or customer segment.

Because not all customers are of equal economic value to an organization, it makes most sense to regard customers based on a perceived value relative to their past, present and projected future transactions. For example, technology is one way to lower service costs on all transactions but it can be applied more heavily to marginally or unprofitable customers to reduce the cost of service for those segments even further. The higher-

potential customer should have the option of interacting with the organization in such a way that is most suitable to that customer, whether it be a live agent, a fully automated solution or an integrated hybrid construct of live agent and technology. The algorithms that determine customer routing and treatment must be reviewed and updated, often every quarter.

Differential service investment in customers individually or by segments defines the core of the return concept. Service investments in the contact center channel should be approached similarly to the decisions to put operations on the “right-shore” to take advantage of favorable labor rates, unique or evolved capabilities and the benefits of globalization.

Return

Obtaining customer profitability is the aim of all for-profit enterprises and the contact center can play a significant part in achieving this outcome. Within the contact center channel, investments are typically made in agents and their management, technology and customer experience processes.

Agents and their Management

Whether it is recruiting and staffing more experienced agents and managers or increasing the ratio of managers to agents, the people that deliver and directly

support the customer interaction are ultimately most able to maximize the customer value. Investments in this area, when applied effectively, always have the greatest impact.

Technology

Many companies have vast amounts of usage and, to a lesser extent, behavioral data on customers. Using that data to inform each interaction can help to elicit and achieve the profitability that often remains untapped. Technologies exist that allow clients to provide different levels of service to different customer segments, thus reducing cost of service to less profitable segments and providing higher service levels to more profitable segments. Technology is never a substitute for agent effectiveness, but when applied in the right areas, it can enable data-driven decisions at levels of consistency that otherwise are not easily obtainable.

Customer Experience Process

An effective training program and a positive learning environment for customer service/technical support agents and first-line supervisors are essential to facilitate the transformation of a service-only culture into a service and sales culture – one that includes communicating with customers so that the true value of each customer and individual interaction results.

Determining your Customer Investment
When reading the following

quotation, consider the vital role the contact center can play in building strong customer relationships and how important your customers are to you.

... To understand the connection between customer relationships and growth, begin with a simple fact: In business, every decision ultimately involves economic tradeoffs. Every company would want better relationships with customers if these relationships were free. Every CEO would prefer to meet earnings goals with good profits than with bad if there were no cost involved. Indeed, the abuse of customers would end tomorrow if ending it had no effect on companies' financial performance. But of course building high-quality relationships does cost something – often a considerable amount. It requires investment. It requires reducing a company's reliance on bad profits. There is no way to deceive or exploit customers and build better relationships with them at the same time.

But the real question is not just the costs but the benefits, and how the one stacks up against the other. Companies need to understand the economic value that results from building better customer relationships.

– Fred Reichheld, *The Ultimate Question: Driving Good Profits and True Growth*



About the Authors

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About ClientLogic

ClientLogic is a leading global business process outsourcing (BPO) provider in the customer care, fulfillment and back office processing industries. ClientLogic's global footprint spans 49 facilities in 13 countries throughout North America, Europe, Africa, Central America and Asia. ClientLogic's consistent service

quality across channels, media and countries helps clients improve their return on customer investment by reducing service cost, improving customer retention and increasing revenue per customer. For more information, please visit <http://www.clientlogic.com>.

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Does "Scripting" Have To Be A Bad Word? By Kimberly King

When we think of scripting in a call center environment, we recollect the days when we monitored every single word to ensure that the Representatives were saying the exact script that we had provided to them in training.

We began realizing that our conversations with our customers sounded stiff, robotic and "scripted" (gee, I wonder why?). We then swung the pendulum in the other direction and did not provide anything more than key words during training. Systems were becoming more sophisticated and so more of the training time was invested in system and product knowledge rather than communication skills with the customers. Now we have Representatives who know the information but do not communicate it in a way that maximizes the efficiency of the interaction or meets the emotional needs of the customers. The time has now come to move the pendulum to

the middle of the spectrum and provide examples of different parts of the call which include key words and phrases so that the information is delivered efficiently and effectively without sounding robotic and disconnected from the customers. Here are the necessary steps to take to ensure that your employees have the word choices they need without sounding robotic or mechanical.

Develop a Standard Call Flow.

The call flow helps the Representatives understand the key parts of the interaction and what you want to accomplish. Some parts of the call flow include greeting, acknowledging, probing, transition, summarizing and conclusion. Starting with a detailed call flow helps everyone understand the key parts to the customer interaction, the goals and the direction of each part of the communication flow.

Provide Examples for Each Part of the Call Flow.

Examples are critical to provide specific choices of what is appropriate and what is not appropriate at each part of the call. Probing is a skill that requires examples for all the different call types. The questions required of a new account holder are different than the questions required when purchasing a new product or filing a complaint. Be sure that your examples

are specific and that you provide multiple choices.

Offer a Great Deal of Practice Time.

The most important part of mastering the art of communication is plenty of practice time to perfect your responses to customer's questions. Role plays are a critical part of the learning process and ensure that your Representatives sound natural and confident with their delivery of new information.

Prepare Preferred Communication When New Policies or Products are Released.

When new policies are released, be sure that you provide scripting options to your Representatives. Without these examples, they will announce your changes in their own style. The result will be phrases like, "We don't do that anymore." "Now you'll need to call another number." "We have now instituted a \$5 fee for that service." The list of phrases that are not acceptable is endless and definitely ones that you want to avoid. Be sure to provide sample ideas of verbiage, provide practice time and ensure that your Representatives have all the information they need to professionally and positively present the information to your customers.



Prepare your Supervisors for Coaching.

As always, when you are introducing new word choices and call flow recommendations to your Representatives, be sure that your Supervisors are well versed in modeling the desired changes so that they can effectively drive the desired changes.

InterWeave President, Kimberly King, challenges you to listen to your phone calls and review emails that your Employees send to customers. Do you say WOW when you hear the phone calls or read the emails? If not, you may be experiencing increased escalations, increased customer complaints and reduced sales. Create WOW customer experiences by contacting InterWeave at 877-96-WEAVE or visiting www.interweavecorp.com.

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How to Cure the Common Cold – Speech Makes Change of Address Easy

By Jessica Disney

Change of Address, the self-service application that sounds oh-so-simple. Yet, until now, you've always needed a person to process a new address. Change of Address is like the every day common cold of the business world. It's a fact of life, you

can't cure it, and you can't make it go away. Now with the power of speech, however, you can treat it and make it easier to live with while it runs its course. Or you can recover faster with the least amount of impact to your business and for your customers. Speech makes change of address easy!

It's such a basic function that is part of every business. Whether it's for your customers, your employees, your vendors, it has always required a human to process a change. Imagine trying to enter an old address, a new address, an effective date all through a touch tone interface on a phone's dial pad. How would the system know when you have finished entering the street number versus started spelling the street name? Or are you entering a zip code or are you still spelling the state name? Would you use abbreviations for states or the full spelling? What if your caller didn't know the abbreviation, e.g. Maine is MA (6 and 2 on the key pad) or is that Massachusetts? The overhead of multiple menu choices and the large number of prompt options that would be required to process this application with touch tone have not made this a successful application to automate in the past.

All this tedious data entry interaction using a phone

keypad is overcome and removed with speech, significantly improving the user experience. Automating the process with speech recognition and natural language understanding and routing makes it simple to use. The caller is able to speak in a natural manner and answer the prompted questions for the old address and the new address, usually within less than a minute versus up to five minutes by talking to an agent. The speech system is able to take the information provided and use it to match the new address against the US Post Office directory listing for validity of the street name, to make sure it matches the city and the zip code before changing the data base and while the caller is still on the phone. This increases the accuracy of the database change before the change takes place. The caller is not frustrated by having to repeat spelling of names, repeat city information, wait for an agent to scroll through screens to find the account information and type in the change of address into the correct fields.

A common problem encountered by callers when working with a person to make the change is encountered when providing multiple telephone numbers with different area codes, e.g. home phone is 916-555-1212, but the work phone is 415-555-6666. The agent starts typing the 916 as the area code and

415 as the prefix. They realize after the number is typed that they captured it incorrectly and ask the caller to verify the number or restate the number again. All this takes additional time, not to mention frustrating the caller.

When considering a speech 'change of address' solution for your company, evaluate three key areas for your business case where other compelling savings can be gained, all from this one simple application. First is increased agent productivity, second is increased contact center productivity due to decreased call durations, and third is revenue gained due to the overall productivity increase. So let's look at a simple business case on how to pay for the cure to your common cold.

Increased Agent Productivity:

Take a call center with an estimated number of 250,000 additional calls per month that are now handled by Speech Recognition rather than by an agent. Assume the average call length is 3 minutes or (180 seconds), so this would equate to 12,500 hours per month saved in human labor cost. Now let's assume your agent cost to handle that change of address call is \$24 per hour and they handle these calls 12 months per year. You would be able to save three million, six hundred thousand dollars in the first year of use for the



application. That exceeds any purchase, implementation and maintenance cost you would encounter to automate this function. And, as an added bonus, any additional applications would provide a significant value to your bottom line over and above just a change of address.

Identify how using speech to do a simple application such as 'change of address' justifies automating this function to find business relief. And this is just the stepping stone to finding many new applications that can be solved by speech that can't be addressed with touch tone today. By automating this one function it improves your

customer acceptance of using an automated change of address application because it is now faster and easier than talking to a contact center agent (in many cases as much as 50% within the first three months). You will find your customer satisfaction levels can increase by as much as 3-5pts and best of all, how the system pays for itself very quickly, usually in less than a year.

Use these Return on Investment models to help you determine how quickly you can benefit from automating a 'change of address' application by using speech.

Revenue Gains from Increased Productivity

If your contact center is a profit center, this calculation quantifies potential revenue increases resulting from productivity gains:

Average number of calls shifted to self-service per month with Speech Recognition

Average length of a current agent call in seconds
multiply _____

Total potential saved time in seconds that agents
equal _____

Can now allocate to calls requiring personal Service

Expected new average length for agent calls
In seconds ¹
divide _____

Total number of potential new customer calls that can be handled by agents
equal _____

Percentage of productivity gain that will lead to new sales generation
multiply _____

Average value of sale
multiply _____

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Twelve months in a year
multiply _____
 –
 Potential annual revenue
 increase
equal _____

Productivity Gains due to Shorter Call Lengths

If your contact center is a profit center or a cost center, this calculation looks at productivity gains due to streamlined call handling:

Estimated number of seconds saved per call when Customers use speech recognition to initiate an agent transaction

Average number of calls per month
multiply _____

3,600 seconds per hour
divide _____

Total time savings in hours per month
equal _____

Typical hourly wage of contact center agent
multiply _____

12 months in year
multiply _____

Potential annual value of improved agent

equal _____

Productivity due to streamlining calls with Speech Recognition

Revenue Gains from Increased Productivity

If your contact center is a profit center, this calculation quantifies potential revenue increases resulting from productivity gains:

Average number of calls shifted to self-service Monthly with Speech Recognition

Average length of a current agent call in seconds
multiply _____

Total potential saved time in seconds that agents Can now allocate to calls requiring personal service
equal _____

Expected new average length for agent calls in Seconds
divide _____

Total number of potential new customer calls That can be handled by agents
equal _____

Percentage of productivity gain that will lead to New sales generation

multiply _____

Average value of a sale
multiply _____

12 months in year
multiply _____

Potential annual revenue increase
equal _____

More and more companies realize that by automating this application, they improve their customer satisfaction and loyalty, and can use this one simple application as a proving ground to automate other areas of their business.

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Customer service is, essentially, people dealing with people. Often a lesson for a customer service interaction can be best learned by observing another common interpersonal interaction. Such a fable or parable can make the customer interaction more understandable. At Entretel we make extensive use of parables in our training workshops to make some concepts more understandable to learners. The parable shared below is one from an upcoming book for call center practitioners.

The Parable of The Cookie Before Dinner

If you're a parent you've probably encountered this situation before. You're in the final phases of preparing dinner. The plates are set, the drinks are poured, bread is on the table and the wonderful, homespun aroma of barbecued chicken is wafting through the house. Sit-down time is in five minutes.

Just then you feel a little tug on your apron, you look down and see your five-year old staring up at you. 'Mum, can I have cookie?' Okay, push 'pause' on this little, all-too-familiar scenario.

How to respond? In our mind we might be thinking something such as 'no way, not right before dinner' through to 'what kind of a dopey kid am I raising who can't see that we're just about to eat?' C'mon let's be honest.

We might 'react' to the situation by blurting out a terse "No!" or with an aggravated voice tone say, "No, Terry we're going eat soon." We might even offer a look of scorn or sarcastic amazement which says 'You should know better than to ask.' At any rate a barrier or roadblock is now firmly in place between ourselves and the child and a second roadblock between the child and their immediate wishes. How might our child



react to the sudden bump-stop of their desires? If we're lucky (and I've been told by mothers I know that this rarely happens) ...they might say "Okay mum, thanks anyway." More likely their response will be a repeat of the request, with some voice tone (read 'whining') thrown in, perhaps crying or even a tantrum?

A more positive response from us as parents might be to allow the child to feel a 'gentle redirection' toward their wishes rather than the 'frustrating full stop'. We might say something more positive. "Of course Terry, let's have our dinner first and we can sit down after and have cookies together!" Hopefully, if executed well, the little one will be more focused on the positive that will come later rather than the negative answer they've actually received. Parents who do this often tell me that the child actually may not even notice the 'no'. And, bingo, you will have accomplished your mission as a good parent by providing appropriate nourishment to your growing child.

How does this story relate to Customer Service?

When the customer calls, they have a need (like the child's hunger/desire) and a solution in mind (like the cookie). If we only offer them the 'frustrating full stop' (and tell them they can't have the cookie), they

are unlikely to be satisfied and may present difficult behavior (like the child's tantrum). So instead of the 'frustrating full stop', we must offer 'gentle redirection' (tell them what we can do for them rather than what won't happen).

When a customer calls and asks for something they can't have or aren't entitled to, many reps give them the most immediate response. 'No', or 'It doesn't work that way', 'I can't, it's our policy'. All of these responses have a jarring effect on the client as their momentum comes to a sudden stop. Although the answer offered might be technically correct, in presenting it so efficiently (read bluntly, and sometimes with negative voice tones!) we run the risk of upsetting the customer. As a consequence, the call may be more difficult and longer.

A more positive response would be to offer the 'gentle redirection'. First, let the caller know, with an appropriate voice tone, that you appreciate how they might feel about their situation. The customer will be more receptive to a response to someone who has shown they care and understand.

The next step is to mentally review the facts of the situation to ensure your rationale is logical and that the customer's requested solution is not one you can provide.

Consider what you can do for the customer given their situation. For reoccurring situations that require a 'no' response, plan ahead what possible alternatives can be offered to a customer.

Next, quickly move to speaking about what you can do to make their situation better. This gets them focused on a new direction and therefore thinking less about the old situation. If you've 'positioned' your caring attitude and understanding of the situation well, they may let go of their original request and focus on the new direction, (see 'cookies after dinner' above.)

Then, if the customer goes back to their original request, present, in an empathetic tone, the logical rationale for the decision ('stack the facts') and reiterate your offered alternative. Unlike the young child wanting the cookie, who may not be able to understand the logical argument regarding dietary needs and the appetite necessary for a healthy meal, the customer is an adult who can at least appreciate the rationale for the decision, if not readily accept it. Make sure to keep your voice tone positive. This lets them know that your 'no' is not 'personal', not a whim and not something that can be successfully argued against. Position the facts in a way that makes sense and will be seen as reasonable, lawful, compliant or what works best for that

specific situation. The customer needs to see that you are in control and only representing what's 'right' without your own emotions emerging in your voice and detracting from your positive message.

Once the customer realizes you will not be swayed by their emotional response, he or she can decide to accept your proffered solution, drop the issue, or request to speak with your supervisor. If you've handled the situation appropriately, the supervisor can either reinforce your decision or offer another solution that is within their authority to offer (but maybe not within your level of authority). Either way, if you have handled this professionally, communicated empathy and understanding, and, as necessary, been clear on the rationale for your decision, the customer can only debate your solution, not the manner in which you handled them.

In the majority of cases, if the 'gentle redirection' alternative is offered with care and professionalism, the customer will be quite happy to have his cookie after dinner.

###



BACK OFFICE AS FRONT OFFICE Raising Efficiency to Higher Levels

**David Ramirez, Cystelcom
Sistemas**

The Current Situation

Everybody knows back office management has a critical importance nowadays. Moreover, back office represents a big part of the work in contact center environments, consuming lots of human resources that even in some cases duplicate the amount allocated to traditional front office tasks.

On the other hand, we already have mature processes and tools in the front office management area: business rules applied to routing and distribution, advanced reporting and expert productivity tools.

Having back office tasks such importance, some questions may arise:

Do we have tools that ease and automate the management of the back office?

Can we establish and monitor service levels when it comes to back office tasks?

Are we able to benefit from business rules applied to intelligent routing and distribution of back office tasks as it happens with front office interactions?

How can we improve the

global productivity of a contact center as a side effect of a good back office management?

Some of these questions may lead us to think that currently back office is not being managed as well as front office is, and what is more: we would like to bring all these benefits from the front office world to back office tasks.

Sometimes, difficult problems have the easiest solutions. Instead of adapting all tools to back office management as we know it today, why not converting back office tasks into front office interactions? Let's see how this can be accomplished.

A New Concept

Until now back office has been managed with the help of tools provided by some of the current CRMs with presence in the market. They usually implement repositories with tasks that should be managed by certain groups of agents. So the agents basically have to manually "pick-up" the tasks from the repositories they can access.

Obviously this "pick-on-demand" point of view is radically different from the way calls are distributed by an ACD. In a front office environment voice calls are received, later some intelligent rules can be applied to them in order to segment and

prioritize those calls, and finally calls are automatically distributed among agents having in account their ACD states.

If we try to apply these concepts to back office management, we find that the optimal solution should be including back office tasks as front office interactions like it happens in the rest of channels (i.e. voice, email, fax). So, the systems should implement a *Multichannel Universal Queue* that could be able to unify and distribute all types of interactions (front office) and tasks (back office) among agents for all the communication channels that could exist in the contact center.

Let's imagine that we have different CRMs and ERPs that could generate back office tasks either manually or as a result of a workflow process. It would be desirable that a system could retrieve all backoffice tasks and distribute them among agents with the same advanced features as the ones we have available on a legacy ACD.

Logically, not only back office tasks should be distributed with the same philosophy, also interactions like voice, email, fax, sms, video and chat could be managed with that multichannel automatic interaction distributor.

As we can see in the diagrams above, all voice concepts like intelligent routing, queues, skills, and CTI are applicable to the rest of channels to achieve the same level of excellence as the one we have available on current call centers. The key of success is having multichannel queues capable of receive all kind of interactions and distribute them, being the most important of them backoffice tasks.

Boosting the call center efficiency to its limits

As mentioned in the beginning of this article, backoffice resources are a critical part of a contact center, since there are usually between 4 and 10 dedicated back office agents per customer service representative.

It is a common practise isolating back office agents from the front office staff, and the workforce team and the contact center supervisors have the task of dynamically allocating resources to both workgroups. This task is not easy at all, and is time consuming and most of the times extremely inefficient.

Another fact is the real occupation of the front office agents, which depending on the target service level oscillates between 65% and 80% in the best cases. Experience proves that the upper limit is never surpassed,



as resources are not always optimally assigned and even having workforce tools available the distribution of calls and other external factors are not predictable sometimes.

Based on these premises we can consider two ways of boosting productivity in our contact center:

Increase agent capabilities so they can manage interactions coming from any available channel simultaneously. Multichannel services can make this possible

Automate the allocating of resources using real-time processing of relevant parameters coming from the contact center and from WFM tools. It could be considered as an “autopilot” for the contact center, with its intelligence based on established business rules.

Imagine two typical situations on a contact center with for example 80 backoffice agents dedicated to fax orders processing and 20 frontoffice agents dedicated to customer service:

Scenario 1: In a certain moment all fax orders have been processed and there is an avalanche of calls to customer service caused by a TV commercial. Wouldn't be desirable having the resources reallocated temporary so back office agents can pick up calls in

that situation? This could be an example of automation of the resources.

Scenario 2: imagine that service level for customer service calls is required to be very high. That means that clients almost do not wait, but agents have longest wait times. It would be nice filling that wait times with short duration backoffice tasks, so we can improve efficiency. If we have the appropriate tools we could treat backoffice tasks as frontoffice and blend them with the rest of interactions.

As the amount of backoffice tasks is usually huge there always will be tasks ready fill those gaps among voice calls. As a result, these practises may lead us to increase efficiency even a 20% more. In terms of ROI, the benefits are clear: just multiply 20% of the frontoffice staff expenses and you will be done.

Backoffice Intelligent Management.

Other consequence of treating backoffice as frontoffice is the possibility of using all the consolidated technology that we have available on voice systems.

One of these applications is intelligent routing, this time applied to backoffice tasks, as well as to emails, faxes, video, chat or any other channel that could be managed by the *universal multichannel queue*.

Isn't it true that sometimes it's more interesting finish the task of activating a new service for a VIP customer than answering a call asking for information from a standard profile customer?

Applying that kind of business rules intelligently can lead to increase profit and to offer a better overall customer service to selected customers.

Backoffice Monitoring and Reporting

In order to help obtaining the established service level for each service there are excellent tools available, at least in the traditional ACD world. Real-time monitoring of a variety of parameters: calls queued, service level percentage, calls abandoned, average handle time, etc...

Nowadays it is a hard task obtaining performance data for email, fax and other asynchronous communication channels, but it is especially significant when it comes to measure backoffice performance.

With the frontoffice way of managing backoffice we have all these valuable parameters in our hands: number of tasks accomplished and waiting, service level percentage, average handle time and after all any information available on legacy systems and inexistent for backoffice before assuming

this new approach.

Of course all this information should be unified with the rest of the present channels including voice, so the people responsible for managing the contact center has the same level of information for new channels including back office as they have with mature ACD systems.

Summary of Benefits

Given this new approach to backoffice management, we can summarize the benefits we can obtain as follows:

Multichannel agent capabilities can provide productivity increases of up to 20%
Automation of resources allocation and blending of all channels including backoffice can optimize the overall contact center performance
Capability of establishing and monitoring service levels for backoffice based on business objectives
Unified reporting tools reduce management and supervision workload and consequently make workforce costs drop
Common business rules determine the routing and priority of each interaction independently of the channel used, including backoffice tasks
Non-invasive solution. All investment previously made in voice and in backoffice systems keeps preserved

###



Case Study: ISC

MAXX, The Auckland Regional Council's Public Transport Contact Centre Auckland, New Zealand

Reaching out to Irene Hosted: ISC hosts workforce management system half way around the world

AUCKLAND, NZ – When Business Performance Manager Grant Wilson sits down at his desk at Maxx, The Auckland Regional Council's Public Transport Contact Centre, Auckland, New Zealand's free public transportation information service, to manage the team of 50 agents, the first thing he does is launch Internet Explorer on his PC and log onto Irene Workforce Management Software hosted on ISC's servers half way around the world in Richmond, Virginia. Reaching out to Irene puts him in touch immediately with exactly who on his team is on duty, who's on break, who's on vacation, who's home sick and who is filling in, and offers up a reliably precise view of what the schedule will look like in the future.

Auckland sits in a notch in the North Island formed by the Hauraki Gulf and is the largest city and chief port of New Zealand. The current population in the metropolitan area is more than 1.2 million

people, equal to roughly one-third of the population of the entire country, and includes the largest Polynesian community in the world. Auckland is the home port for the New Zealand Navy, and its economy includes major manufacturing, fishing and tourism.

When someone in Auckland wants to know the best way to get by train to Waitakere, or by bus to Karangahape Road or by ferry to Rangitoto Island, they call the MAXX Contact Centre. It's Wilson's job, to make sure their calls get answered in a timely fashion, seven days a week. Factor in holidays, special events, stalled buses, late trains and the variety of interruptions that beset transit on land and sea, and the volume of calls can easily soar beyond 4,000 a day. Wilson says a late bus will often prompt calls from commuters on their cell phones wanting to know when the next bus will get to their stop.

Before Wilson found Irene, it took 30 or 40 hours a week to come up with call forecasts and schedule agent requirements using an Excel spreadsheet that he had inherited from a predecessor and customized over several years. Managing the schedule was extremely labor intensive because of all the last minute adjustments that were required to match the scheduled staff against the

call flow pattern from the corresponding day of the previous year. It was accurate, after a lot of cutting and pasting, but it was tremendously time consuming.

Irene changed all that. With Irene's browser-based service, forecasting and scheduling are now automated. Not only is Wilson able to respond much more quickly to short term changes in call volume, but he is also able to provide much more flexibility for his full-time agents. The power of Irene also makes it possible to integrate and take better advantage of part-time employees from the University of New Zealand down the block from MAXX's offices.

"Has it made people happier about their roster? Absolutely!" Wilson says.

Not all the calls to Contact Centre are about transportation. Wilson maintains separate calling queues where the agents need to be trained in environmental issues and specific regional parks. In the past, Wilson had to maintain separate teams for each skill set. Now, however, the skills-based functionality of Irene makes it possible for him to leverage different skills within his base of agents who are all on the same team.

Wilson says he hasn't yet explored all the different things that Irene can do for him. Nor has he found any feature he

needed that Irene didn't already have.

One of the best features of Irene's hosted service, Wilson says, is that there were no installation hassles, no server problems, or networking challenges.

"That's been a real bonus," he says, "There's no IT work at all. All we have to do is log in." The hosted version of Irene requires no upfront investment in additional hardware or software and that means no obsolescence, either. Irene Hosted is always accessible and instantly scalable.

Data from the MAXX Contact Center is uploaded regularly to ISC servers in the U.S. where it is immediately available to Wilson. There is a 16-hour time difference between Auckland and Virginia—when it's 8:00 AM Tuesday morning in Auckland, it's still only 4:00 PM Monday at ISC headquarters in New York—but, Wilson says, support from ISC has been consistently responsive, nonetheless.

By freeing Wilson from the laborious tactical issues of forecasting and scheduling, Irene has made it possible for him to spend more of his time on strategic issues such as evaluating and improving training and expanding the scope of his call center's capabilities.

"Irene has exceeded all our



expectations,” Wilson summarizes. “It’s powerful, but very easy to use. We got up to speed quickly and, when we needed support, ISC was right there for us. Other applications I’ve seen were too cumbersome. Irene was just right.”

About ISC
ISC Consultants, Inc., headquartered in New York City, is a leading provider of sophisticated call and contact center workforce management consulting services and software. Irene, ISC’s forecasting and scheduling software, is available in an enterprise version or as an online hosted service, which can be accessed over the Internet. It utilizes the unique ISC Optimization Engine, a “smart” patented software engine that forecasts demand and optimally schedules resources to meet it. ISC’s founders were senior executives at IBM and Xerox and its employees include management and technical experts from AT&T, Bell Labs, Bellcore, and IBM. Irene software is used by large telecommunication companies as well as small manufacturers. For more information, please visit <http://www.isc.com> or call toll free 877-472-4472.

##

NEWS

Highlights of the Aspect Contact Center Satisfaction Index Europe- The European Customer Experience

- **Higher use of email in Europe** — In Europe, 66 percent of customers prefer telephone contact and 33 percent of customers are using e-mail to contact companies, while in North America, 79 percent of customers prefer using the telephone and only 18 percent use e-mail to contact a company.
- **Empathy and Advocacy is King** — Among the tested criteria, empathy and advocacy was the most important quality in customer interactions to both European and North American consumers. This quality refers to the human interaction element (patience, knowledge, professionalism and friendliness) of the customer-business relationship.
- **Efficiency Is More Important to European Customers** — European customers reported that contact center efficiency was almost as important as agent advocacy and empathy— as many as 85 percent of customers deemed these features as extremely important. In

North America, only 59 percent of customers found any of the efficiency features to be extremely important, a distant second to empathy and advocacy features.

- **Interactions Consistently Fall Short of Expectations** — More than 20 percent of customers in Europe (22 percent) and North America (23 percent) reported that their last contact center interaction fell short of expectations, yet a small minority of contact centers feel that they fall short of meeting customer expectations— only 2 percent of contact center managers in Europe and only 10 percent of North American contact centers acknowledge these shortcomings.

For the full summary of the report or the 2005 North American Aspect Index, visit www.aspectindex.com. If you have any questions, feel free to contact:

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KNOVA Releases Powerful Application Suite to Deliver Intelligent Customer Experience

Featuring Personalized Microsites, Advanced Analytics, Self-Learning Search and Collaborative Authoring, KNOVA 7 Further Advances KNOVA's Technology Leadership

Cupertino, Calif. – KNOVA Software, Inc.™ (OTC Bulletin Board: KNVS), a leading provider of Intelligent Customer Experience? applications, announced the general availability of KNOVA 7, the new version of the company's award-winning application suite. As the industry's most adaptive search and knowledge management platform, KNOVA's new application suite brings the power of Web 2.0 to the enterprise, from marketing and product selection through service resolution.

“We’re delighted by the early customer feedback from our KNOVA 7 deployments. By setting a new bar for delivering a personalized, knowledge-optimized customer experience from pre-sales through post-sales support, KNOVA 7 is an important milestone for not only our company and customers, but for the market overall,” commented Bruce Armstrong, president and CEO of KNOVA Software. “We are excited by the competitive



advantage KNOVA 7 will provide in the marketplace and the business value KNOVA 7 will deliver to our customers.”

Interactive Intelligence Releases New IP-based Predictive Dialer and Gateway

INDIANAPOLIS — Interactive Intelligence Inc. (Nasdaq: ININ), a global developer of business communications software, has released a new VoIP-enabled version of its outbound dialing and campaign management software, Interaction Dialer®, designed for contact centers, teleservices firms and collections operations.

The latest release of Interaction Dialer, version 2.4, is now based on the SIP standard so it can operate in an all-software, all-VoIP environment to help reduce costs and simplify management. The release includes an all new SIP gateway called Interaction Gateway™— an appliance connecting legacy telephone trunks (T1s) to VoIP networks. Interaction Gateway works with Interaction Dialer to give high-volume outbound contact centers accurate predictive call analysis capabilities.

“Interaction Gateway is unique because it provides advanced outbound call analysis — such as answering machine versus live speaker detection and

wrong number versus network issue differentiation — while taking full advantage of the open SIP standard,” said Yankee Group senior analyst, Ken Landoline. “Combined, these enhancements result in more effective dialing campaigns, simplified deployment and configuration, lower cost, better redundancy, and unbeatable flexibility compared to traditional outbound dialing solutions.”

The new SIP-based Interaction Dialer can lower costs by between 10 and 50 percent compared to traditional TDM-based dialers by reducing hardware requirements. The SIP-based Interaction Dialer can reduce costs further using Interaction Gateway at strategic locations to ensure Dialer uses the most cost-effective call routing. In a typical configuration, ISDN PRI trunks from the public phone network are connected to Interaction Gateway. After that point, the entire configuration is voice over IP. This provides unmatched geographic independence. For example, the Interaction Dialer and Gateway servers can be in the U.S. while agents are in India.

###

Castel Announces the next generation of Intelligent Message Delivery

New Intelligent Message Delivery features enhance the functionality of Castel Connects® predictive dialers and delivers bottom-line performance

BEVERLY, MASS. - Castel, Inc., a leading supplier of dialing solutions, today announced the next generation of its Intelligent Message Delivery (IMD) system. Enhanced IMD with full text-to-speech capability and DTMF recognition increases Right Party Connects and improves agent productivity with low total cost of ownership. The typical payback for an installation of Enhanced IMD is two months compared to a hosted solution. Users avoid paying expensive ongoing monthly fees while reaping the benefits of its full functionality.

“Our state-of-the-art IMD system delivers bottom-line performance,” said Nick Kimball, President and CEO of Castel. “Users realize a fast payback making the total cost of ownership lower than competitive products,” he said. In addition, unlike other hosted message delivery systems, Castel’s IMD lets companies keep all sensitive customer data in-house securely behind

the corporate firewall. Hosted solutions require data to be warehoused externally, increasing the risk of compromise. In a time when data privacy is so critical, keeping data on-site is a major benefit.

Castel’s IMD coordinates voice and information delivery to agents using a unique transfer system and instantaneous screen pop-up. Traditionally, callers would have to wait for an agent to hear a whisper transfer whereby the caller’s account number is literally whispered in the agent’s ear.

“Castel’s IMD eliminates the whisper entirely, reducing errors and hang-ups. The whisper system increases the probability that an agent will key a wrong account number and be unable to identify the customer, increasing the likelihood of a called party hanging up. IMD system eliminates those errors and saves time and money in the process,” Kimball said.

###



MARASTAR COMMUNICATION'S
"ToonUp" Animations **PUT LAUGHTER TO WORK..** and are now even easier and more fun to use!

MaraStar Communications, in business since 1998, now offers an even easier way for managers, trainers, and human resource personnel to create a positive work environment for their employees, leading to greater job satisfaction, improved productivity, and happier customers!

MaraStar Communications has created hundreds of unique animations for training, motivating and communicating with employees. These animated messages are fun and flexible and make training and communications fun for the learner.

MaraStar's animations can be sent via email, used in PowerPoint, posted to an intranet site, used in Online Training or CBT, or played in break rooms, delivering training tips and important workplace messages in a way employees haven't seen before!

Now, MaraStar has made sending these topical, corporate animations easier than ever with MaraStar's **new web portal**. The web portal allows those purchasing the animations to customize

their own package, choosing just the right mix of topics and messages to send through an animated email.

###

SPOTLIGHT: OKS-AMERIDIAL

Our U.S.-based operations began in 1987 (parent company since 1932). We have remained a "Top Fifty" telemarketing company now since 1992 (as ranked by Customer Interactions Solutions Magazine, formerly Telemarketing Magazine).

Unlike many of our international competitors, OKS-Ameridial offers more than 19 years of off-shore program management experience. In 2003, the merger of Ameridial Inc. (based in Ohio) and OKS Limited (based in India and Philadelphia) formalized a relationship of serving customers dating back to 1988.

Complementing our U.S. capacity, OKS-Ameridial owns a 100-seat center in Noida, India and utilizes two three-year partners in India. These centers have been supporting large internationally recognized brands like Dun & Bradstreet, LexisNexis, MTV, VH1, and Ford Motor Company for more than 4 years now with a capacity of 1500+ automated seats. Our

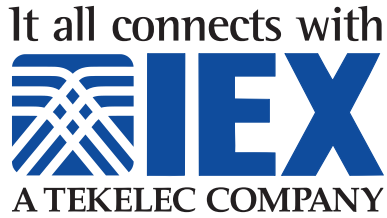
service quality and business model has passed all the rigorous demands you might expect from such brands.

The fundamental reason our model is superior to other off-shore call centers is in the control and basic design. The model is unique in a few broad areas:

- From the very beginning, your program is designed, developed and tested in the U.S. by domestic talent. Once the metrics are proven and the program is solid, we then direct the program to the best shore solution. Simply put, we evaluate the specific customer application, human and technical infrastructure required as well as the customers economic requirements and allocate the project accordingly.
- On an ongoing basis, your program is managed and continuously improved by that same U.S.-based management team. Your principle points of contact and facilitators of the program are always US-based.
- All voice and data is controlled and routed to and from our centralized server in The United States. Data is not shipped to and from India, it is completely controlled and managed in Ohio. Client reports and data are all delivered from our Ohio Headquarters by US-based Program Management and File Clerks.

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