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## EIGHT RULES FOR IMPROVED INTRADAY OPTIMIZATION

By: Bob Webb, VP Sales, Pipkins, Inc.

Are you prepared for last minute changes that are sure to occur with agent scheduling? This is a universal problem that all centers face. It can be especially challenging for those without an automated solution for agent scheduling and the ramifications can be significant. If staffing is just 2% below where it should be, the percentage of calls answered within 30 seconds or any other established performance objective typically will drop by 10%. If 10% of the seats are vacant, half of the center's incoming calls will likely not be answered in the desired time interval.

There are two solutions to this problem. One is to implement an advanced workforce scheduling system that has a vacation planning module which will integrate with your workforce optimization program. The other is to implement a few simple strategies which can help simplify the process. Try these eight steps to ease the pain of last minute scheduling problems.

## 1. Inform agents of your intra-day policies

Informing agents in advance of what may be expected when call volumes exceed forecasts or the call center is otherwise in crisis can mitigate confusion and tension when last minute changes occur. If they know to expect adjustments in their schedules, they are more likely to be compliant.

# 2. Be prepared by reviewing schedules beforehand

Schedules can be affected by many different factors

and staffing problems can be prevented by implementing a regular review process that will detect obvious shortages or surpluses ahead of time. Ideally, each daily schedule should be reviewed a week before and then a day before the live date. During peak seasons, it may be advisable to add a third look in the middle of the week. A quick check for deviations in agents required versus agents provided is all that is needed.

# 3. Establish trigger levels and tipping points

Establishing trigger levels can avoid last minute panic in intra-day scheduling. Use of historical data can reveal what conditions have led to scheduling problems in the past and help determine when you will hit a threshold that requires adjustments for current scheduling. You must determine the tipping point for key metrics such as percent over forecast. Defining your target numbers in advance will enable you to operate comfortably knowing adjustments will not be necessary unless you hit them. Most contact centers are capable of absorbing at least 5% more calls than anticipated and/or agent shrinkage of up to 10% before service levels start to plummet. Conversely, most can tolerate at least 5% fewer calls before needing to consider cutbacks in same-day staffing levels.





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## 4. Create an intra-day forecast

As soon as you approach your trigger levels, use your workforce management software's intra-day forecasting tools to assess the potential impact on the remainder of the day. Advanced systems will be able to provide forecasts at 15 and 30-minute intervals based on current call volume. They will also be able to calculate staffing surplus or shortage levels for each interval.

## 5. Decide what changes should be made

You will need to decide which shifts to designate for schedule adjustments. Should shifts be lengthened or shortened, can you cancel or add discretionary off-phone activities such as meetings and training sessions, and can employees who are scheduled later in the day be asked to arrive earlier? Generally speaking, it is advisable to reoptimize staff members who are already in the building. Start with the simplest

options and see if they will produce the desired results.

## 6. Run a preliminary "what if" scenario

You will need to run a preliminary scenario to see how many changes would be required to align staffing with service objectives and review the results before proceeding further. If your workforce management system has a reoptimization utility, it will be integrated with relevant data such as call volume and real-time staff attendance. The system can then be preconfigured with rules providing new calculations which address overtime issues. meeting or training schedules, and lunch and break adjustments.

The system will then generate a new staffing plan to calculate the impact on service levels and deliver the results as the percentage of calls that will be answered within your target interval. Various scenarios can be run with different sets of

parameters to help hit your target numbers.

#### 7. Consider your options

It is now time to weigh changing the schedule against the results to be obtained. Many times the answer can be found in something as simple as canceling a scheduled meeting in order to free up enough agents to cover a shortfall without making any further adjustments. If the reoptimization process does not yield at least a 2 or 3% improvement in service levels, the end may not justify the means.

# 8. Notify agents of staffing changes that need to be made

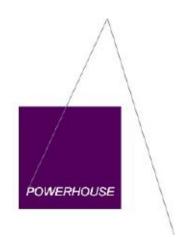
The final step is to notify staff of schedule changes as quickly as possible. Some workforce management systems will automatically notify agents by email, pop-up or dashboard messages. Otherwise, supervisors must print and distribute new intra-day schedules, or talk to agents individually.

#### **About Pipkins Inc.**

Pipkins Inc. is the leading supplier of workforce management software and services to the call center industry. Its Vantage Point product enables managers to solve complicated operational issues in today's multifaceted call center environment. For more information, visit www.pipkins.com.







## **RANTS & RAVES!**

#### **Randomly Timed Musings**

#### **April 17<sup>th</sup> - Spring Cleaning in the Contact Center!**

By Kathleen M. Peterson Chief Vision Officer, PowerHouse Consulting, Inc.

It is Spring, a beautiful time of year - one with many meanings and celebrations dating back to ancient times. Recently I read about an interesting Spring ritual, that of decorating hard boiled eggs not as holiday eggs but as a means of documenting objectives for the year! You creatively illustrate your objectives, then peel and eat! A bit odd, but this could make an interesting day in the Contact Center.

My favorite Spring ritual, however, is not eating hard boiled eggs. It is Spring Cleaning! Like exercise, it is hard to make yourself do it, but you feel SO good when it is finished.

So here's the thing - we all know the importance of setting out clear objectives for the year. We need to have vision, goals, and action items, but we also really need to pursue these goals within a clean and tidy environment. Now, I am not trying to act like your mother. But really, what would she say if she could see your desk or your computer filing system?

The time has come to clean up your operation - physically that is. I would like to call for a massive Contact Center Spring Cleaning Day. How about tax day, April 17<sup>th</sup>? We could all use a little distraction and brightening up on that day. Consider bringing in some Hefty Trash Bags, or better yet, some Recycle Bins and start tossing! *Maybe there could be an award for most stuff tossed. Or the craziest thing rediscovered.* 

This is also a good time to review your policies and procedures. Do they need any "cleaning up?" If you have workspace rules like *no food at the desk* or *no non-business publications or paper* - take a look around. Is anybody adhering? If not, maybe it is time for a change. If there isn't compliance and no consequence, Spring Clean and get rid of it! Re-introduce the objective of the policy and reestablish a professional business environment. Don't fret the details. Whatever it is, it needs to be TIDY. And just for the record, this Spring Cleaning is much more a management issue than a staff issue. But you already knew that. Good luck and take photos! (I'd love to hear stories and see pictures!).

PowerHouse Consulting, Inc. 360 Route 101, Suite 6 Bedford, NH 03110 www.powerhouse1.com 1-800-449-9904



# Want to open a merchant account? Consider your options

Today, 80 percent of customers use credit cards to make purchases, so only accepting cash or checks simply does not make sense. Merchant accounts, offered by banks and other financial institutions, allow small businesses to accept credit cards. Unfortunately, 27 percent of all businesses are turned down for a merchant account. The good news is that a little advance planning can stack the odds in your favor and lower your chances of being denied. Schedule an appointment with a bank executive. Find out who is in charge of making decisions on merchant accounts and make an appointment specifically with them. Bring any client testimonials, products, service literature, video clips, etc., which would prove to the bank that you are a legitimate and successful business. Remember that when the bank executives actually see your products or literature, they can better understand your business. And realize that it can be difficult for an outsider to understand your company

and envision it's success as well as you can. Having concrete examples makes it easier: if the bank understands your product and mission, they are more likely to grant you a merchant account. Shop around. Different banks cater to different markets. Shop around for a bank that specializes in your type of business. For example, an adultentertainment business wouldn't go to a typical bank to ask for an account, because they would probably say no. But if you had an adultoriented business selling legitimate, tangible goods, you could then find some domestic, liberal banks that would be opened to granting an account. Before you submit your application, ask the bank representative who his or her typical business client is. That will help determine if your business is one they would approve. Consider offshore banks. Offshore merchant rates

are a little higher, but you

will also find more liberal

banks that are willing to

take on more risk. For

example, if you were

selling a membership program that charges a yearly fee, an offshore bank would be more open to that than a domestic bank that doesn't want to go 12 months between payment times. The drawback is that you might find it difficult to deal with an offshore bank by yourself. If this is the case, work with an independent sales representative for Visa or MasterCard to smooth the way. Not only can the representative assist you with opening up a merchant account in a foreign country, but he or she can also help you get incorporated, set you up with a director who is a professional in that market and country, and generally steer you in the right direction.

The independent sales representative can also teach you how to sell your idea to a bank and limit your risk. If you choose to go this route and need help finding an independent sales representative, go to an internet search engine and enter "high risk merchants" for some

options.

Investigate third party processing. If you've exhausted all other options, check into thirdparty processing. While more expensive than a traditional bank, it is a valid option. With a third party service like Paycom or Paypal, you use their number, called TID (terminal ID number), to process transactions. The third party processor takes a percentage of your sale before releasing the money to you.

Try and try again. If you have been denied a merchant account for any reason, don't give up. The above tips will increase your odds of gaining a merchant account, so revise your game plan and resubmit your application. Often, businesses are denied merchant accounts because the bank didn't understand the company's business plan or the results they were trying to achieve. Write your plan so people understand who you are and what you're trying to accomplish. Second, realize that a banks takes your



application word for word. When you put on an application, "I sell printing services," for example, the bank understands exactly what that means. But if you say, "I'm an investor in a third party, real estate development business," a bank may not understand what you mean and so they may well automatically turn you down. Once you have a merchant account, you'll need to keep it in compliance, so plan those aspects as well. Know the triggers that can cause the bank to revoke your account and develop a plan to always avoid those situations. For example, you'll want a plan to avoid chargebacks, or disputed transactions. If your charge-back ratio exceeds 1 percent at any given time, the bank can revoke your account. To prevent this, you'll need to write an accurate descriptor of your charge for credit card statements. If it is clear enough, the customer will remember the purchase they made and be less likely to dispute it.

Tiffany Segura,

founder of American Verification Processing Solutions, can be reached at www.avpsolutiuons.com ###

### How to Weather the Storm at Your Call Center Five Tips for

Five Tips for Managing Special Occurrences

By Nancy Miller

As the saying goes, you can't change the weather – but you can prepare for it. Recent highly-publicized airline and product call center overflow problems have highlighted the serious and potentially humiliating problems that can occur when a call center is not sufficiently staffed to handle a crisis.

Ice storms, product recalls, and a sudden run on tickets for a hot Broadway show following the Tony awards, can all be considered "Special Occurrences." Any of these are potential causes for your call center to experience a sharp rise in calls past normal peak volumes. But you can handle them all with relative ease — and retain some dignity — by following a few simple guidelines.

Prepare a standard response

Interactive voice response (IVR) is often your customer's first point of contact. By taking time now to prepare a standard emergency recording – before you experience a special occurrence – you will have a response in place for customers who all may be calling with the same request – such as flight or weather information.

Use a standard script for the most common calls and have an arsenal of prerecorded responses at the ready. For example if you run an airline





call center, extreme weather is your natural foe. You need a general statement saying:

Due to the weather conditions all flights from XYZ airport are canceled until further notice. If this is not an emergency please call tomorrow, we apologize for the inconvenience.

In addition, smart call distribution and routing technology can handle emergency calls if all your agents are busy. Overflow calls can be routed to a voice messaging system or an auto callback system. This will allow customers to leave a message and automatically receive a call-back on a first come, first serve basis.

## Build a Special Occurrences history

Unless you're running a new call center, you've probably experienced a number of scenarios that can help you predict your call volumes during a special occurrence, such as a pending Nor'easter. You should capture this information so you can quickly refer to your history when a crisis is looming. This will allow you to review the data on the last storm and see what effect it had on your call center.

If you're using a Workforce Management (WFM) software solution you can easily capture this data. For example, our software, Irene from ISC, lets you label and store specific call data in a special history file, such as Storms, Power Outages or Special

Occurrences. Your WFM system should allow you to take the historical special occurrence data and apply it to the NOW time frame. This will provide you with new call volumes and people requirements based on factual information.

If you haven't had any special occurrences – and aren't you lucky! – you should still create a file or folder of "What if?" situations. For example: If call volumes double, how many people would I need? If the call volumes triple, how many people would I need (and where can I get them?)

If you are fortunate enough to operate multiple call center locations, you can develop a "What if?" plan for unaffected call centers to staff up and help out those experiencing an overflow.

#### Maintain an "on call" list

One thing you'll need during any special occurrence is a list of potential agents so you can quickly staff up your call center. This list should contain contact information for active employees who always want overtime as well as those employees who live close to the call center. An employee file within your WFM software can assign and identify those employees who historically have provided a quick response.

## Contract with an outsourcer for overflow

Outsourcers can provide you

with the comfort that agents will be available to handle customer calls during special occurrences. Outsourcers will develop a specific support plan to manage your call center's overflow and after hours support and business requirements.

Genefits, including the ability to provide a disaster recovery plan – should the special occurrence be a disaster that affects your call center.

As I said earlier, there's no changing the weather – or the product recall – but with some smart contingency planning, either by hand or with the use of WFM software, you can be ready for whatever comes your way.

Nancy Miller is vice president of consulting services at ISC Consultants (www.isc.com)

# WHEN THE PHONES GO DEAD, PART 2

Disaster Recovery for Call Centers by Mark Hood

Editor's note: This is Part 2 of a 3-part series on how call centers can best prepare for and recover from telecom outages of all types. It's written by Tim Ruff, the president of Telecom Recovery, a Utah-based telecom disaster recovery company.

(Part One of this article (January) listed the different

threats to the telecommunications of call centers and began the discussion of available alternatives to deal with those threats, along with the strengths and weaknesses of each alternative. We continue now with the second-best option available for Inbound call centers, Satellite Backup of the Local Loop.)

The quality of satellite phone service is surprising and has improved dramatically over the last decade. Satellite calls are almost indistinguishable from cellular calls, with latency (delay) that is now less perceptible than calling from the U.S. to a foreign country. When making satellite calls through our home office's phone system, call recipients did not notice that they were called by anything other than a regular phone until we informed them.

#### Diversion of Calls to a Sister Location (for Inbound Call Centers)

The first and best telecom recovery option for an inbound call center is to re-route calls to the same agents in the same building on the same switch, either through multiple carriers,



alternate paths, or both; but if those options are not available, the next best option is to forward calls to a sister location.

Of course, a sister location must exist, and it must have the people, systems, and capacity to handle the additional traffic. For single-location call centers, or if the sister location is smaller or lacks sufficient people or capacity, it's time to move to the next-best recovery option, distribution of calls to the same agents using alternate networks and devices.

#### Distribution to Agents Via Cell Phones, VoIP Phones, etc.

(Editor's Note: Use of this option requires use of Telecom Recovery's Call Recovery Service<sup>TM</sup>.

Telecom Recovery is the author of this article.)

Call Recovery Service<sup>TM</sup>

After an outage occurs it is possible, using Telecom Recovery's Call Recovery Service<sup>TM</sup>, to reroute both toll and toll-free numbers to the Web Call Router<sup>TM</sup> which can then distribute calls via cell phones, VoIP phones, alternate land-lines, and/or hand-held satellite phones

back to agents who may be located in the same building or distributed over a wide geographical area.

The Web Call

Router<sup>TM</sup> is web-based, designed for disaster recovery, and can offer menus, directories, voice mail and other features that can mimic the normal functionality of the regular PBX, to the point of near transparency to the caller. It also has advanced features such as voice-toemail, fax-to-email. find/follow and ACD-type functionality that distributes calls to agents on whatever types of phones that can still ring. It involves no hardware or software purchase or installation, is affordable for even small call centers, and is simple to use. Think of this solution as a PBX in the sky.

#### **About VoIP Phones**

According to a large hospital in Baton Rouge, Louisiana, VoIP phones connected to the internet was the only option that still worked after Hurricane Katrina. Public networks were down, central offices were flooded, cellular networks were destroyed or lost

power, and apparently even some of the satellite bandwidth for hand-held satellite phones was commandeered by the military. Through it all this hospital maintained internet service and was able to connect VoIP phones to place and receive calls through an internet VoIP provider.

Of course, VoIP phones and service require a broadband internet connection to work, but any broadband connection anywhere will suffice. Simply plug it in anywhere from Maine to Australia and get U.S. dial tone and the ability to make and take calls.

Not all VoIP phones are alike, however, and VoIP phones that are proprietary to specific IP-enabled phone systems do provide some handy recovery capabilities, but they also pose additional hurdles when it comes to disaster recovery.

The primary disadvantage of this configuration is that it depends entirely on highquality broadband internet service to the agents, which may or may not be available depending upon the nature of the outage. This also precludes its use to deliver calls to cell phones, satellite phones, and even land lines, unless additional traditional PSTN service is also purchased and connected to the system and it is upgraded significantly.

Conversely, when combined with the technology offered by Telecom Recovery, many types of VoIP phones can be mixed with cell phones, land lines and satellite phones and used as extensions on a wide-area virtual phone system that's easily and rapidly modified via the web. Some agents may have broadband availability and a VoIP phone, others may have cell phones or land lines. Regardless of the phone type, each agent can be treated equally in receiving calls, wherever they happen to be located.

## The Backup Phone System

Perhaps the most commonly sought-after solution—though not commonly implemented—is an entirely separate phone system to be used as a backup. A backup system



can be absolutely indispensable in the case of primary system failure, and it will usually have the power, flexibility, and features desired for a fast and relatively seamless recovery. It is a solution, however, that is only rarely implemented because of large capital expense required. Its high cost puts it out of reach for most call centers, which typically spend well over six figures on the primary system and simply cannot afford to duplicate that expense. And while high cost is certainly the biggest weakness of this option, it is not the only one.

A backup system must be located somewhere, which is a dilemma in itself. If left at the primary location where it's convenient for a rapid recovery, and where it can also use existing phone line capacity, its only benefit is in the case of equipment failure in the primary system; it cannot help with an outage that affects the power, carrier, building, region, transportation, etc. Alternatively, if the backup is hosted elsewhere it must have an entirely redundant amount of capacity (phone lines) always connected to it, which can be a significant monthly expense. And unless the

employees can all get to the place where the backup system is located—which depends on the nature of the outage and even in good conditions may be an iffy proposition—the backup system will require the ability to deliver calls to agents wherever they're located, doubling the capacity needs and often adding an additional upgrade cost. The backup system should also be remotely programmable (most are these days) which can only be done by one or a few people who may or may not be available—or even willing-to assist in the emergency. Last, the

issue of speed is very real and important, and restoring service from one system to any other is usually not quick proposition, making it almost useless for the most common outages—the shorter-term man-made variety.

*If you would like the full* article sent to you or have specific questions about disaster recovery for your call center, please contact Telecom Recovery's Director of Marketing, Mark Hood at mhood@telecomrecovery.co m or 512-330-0309. ###

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fact that all consumers are seeking a unique experience from companies today, and this is it."

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## **NEWS**

# SER Launches Latest Version of CPS Enterprise Edition™

**Dulles, Virginia** – SER Solutions, Inc., a leading provider of call management and speech analytics solutions, has announced the general availability of CPS Enterprise Edition 3.0 (CPS  $E^{2^{TM}}$ ), the latest version of its next-generation outbound call management solution. CPS  $E^2$  offers integrated inbound, call recording, and speech analytics; and powerful call management options that enable contact centers to further optimize their productivity, improve customer interactions, unify outbound and inbound campaigns, and monitor overall business performance.

Since its introduction to market, CPS E<sup>2</sup> has revolutionized campaign management and brought a new level of business intelligence to contact center operations. Its open architecture supports Microsoft platforms (Windows, SQL, and .NET) and XML standards making it easy to interface with existing applications.

###

Call Center Industry Prepared to Propose Sweeping Change

Indianapolis, IN- The political climate of the call center industry has been riddled with government regulation. Even after "Do Not Call" regulations were implemented, there are still frequent consumer complaints concerning call center operations. The American Teleservices Association, the association that represents the call center industry, has taken a proactive stance to improve the customer experience and to reduce the need for government intervention.

The Self-Regulatory Organization of the American Teleservices Association recently completed the first draft of a series of contact center standards designed to provide better customer service and to establish a wellbalanced, symbiotic relationship between businesses and consumers. The standards will regulate such issues as interactive voice response systems, disclosures, up-sells, and many more issues of consumer concern relating to inbound and outbound call centers.

"Each customer experience with a call center drives the customer's attitude of both the specific center, as well as the teleservices channel as a whole. We recognize consumers need to be able to have positive and clear expectations of the channel, which are met with each and every contact they have with a center" said Tim Searcy, chief executive officer of the American Teleservices Association.

The American
Teleservices Association
will release the draft on
April 23 at its legislative
event, the Washington
Summit. Industry
professionals will provide
their feedback on the
standards before they are
finalized and sent to
regulatory agencies and
consumer advocacy
organization.

###

#### ASC Realigns with a Renewed Focus on North America Opens New

Headquarters with New

Management and Staff

Mahwah, NJ, - ASC

(www.asctelecom.com), a
leading global provider of
innovative solutions to record,
analyze and evaluate
communications, announced a
realignment and renewed focus
on North America by opening
a central headquarters in
Mahwah, New Jersey, and
staffing it with new
management, technical experts
and support personnel.

ASC appointed Jim
Thompson as Vice President of
Sales, North America. He will
oversee all company
operations and personnel in the
United States and will receive
technical support from senior
engineers appointed to assist
him.

ASC will focus on its rapidly growing contact center and public safety markets in North America and will tout its latest state-of-the-art solutions for VoIP recording and speech processing. The company will emphasize rapid response for



current clients and effective marketing to new ones.

# VPI Launches New Competitive Replacement Program

Camarillo, CA – VPI
(http://www.VPIcorp.com), a world
leader in the
development of
innovative, integrated
interactions recording
and workforce
optimization (WFO)
solutions, has
announced the launch of
its new Competitive
Replacement Program.

The program makes it easy and affordable for organizations to replace their existing recording and WFO technologies with new, best-of-breed solutions that integrate seamlessly into their existing environment.

VPI's Competitive
Replacement Program
was developed in
response to concerns
raised over recent
industry consolidation.
Many organizations are
very concerned that their
recently acquired
technology vendor will
no longer be willing or
able to offer
maintenance, support, or
upgrades. When

massive conglomerates consume their competitors, some of the newly acquired products may not be a top priority to them nor cooperate well with their existing products, which can leave customers to contend with discontinued product support, costly forklift upgrades, and the need to re-architect their infrastructure.

Author: Alton Martin, cofounder and CEO Company: Customer Operations Performance Center Inc. (COPC Inc.) E-mail: amartin@copc.com Phone: 716.835.4455

###

Performance
Scores: Do They
Really Tell
Contact Center
Managers What
They Need to
Know?

Forget the Scores, Review the Analysis: What's Important Isn't Being Measured by Your Internal Process But by Your Customers

The obvious sometimes escapes us, doesn't it? Who better than our customers to let us know how effective our internal process is at providing the level of quality service that generates growth? Yet, in most cases, contact center management efforts, while

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including customer satisfaction, focus primarily on monitoring internal performance without any consistent way of linking performance scores to Customer Satisfaction (CSAT). Without this necessary connection, performance is basically measured for performance sake, with little possibility of generating data useful for improving ROI.

The important thing isn't having coaches and supervisors reporting that your agents are doing things right. What is important is that your customer satisfaction level accurately reflects their performance. Contact center managers who fail to address this gap between scores and CSAT may find their organizations losing market share as customer satisfaction levels fall.

What transforms a contact center geared toward managing ACD oriented metrics into a contact center with a commitment to delivering high quality and customer driven service? Research indicates that customers expect agents to exhibit active listening, empathy, professionalism, and other basic customer service skills. Each of these attributes is important. Organizations that are effective at understanding

and modifying, when necessary, agent performance will be able to drive Customer Satisfaction. An essential component of this capability is high levels of consistency across the entire population of coaches, team leads, and QA staff, all of whom provide feedback and coaching to agents.

Most organizations have implemented some type of Quality Monitoring (QM) program. If you were involved in the selection process, you are aware there is no shortage of available programs. While most QM programs address the need to measure transactional activities, they do not provide the tools to determine the impact QM programs have on customer satisfaction.

Quality Monitoring, once defined primarily in terms of soft skill performance, has expanded to include any number of components such as efficiency and revenue attained. As a result, most of the tools and "solutions" are designed to assist management in monitoring this broadened array of metrics. The goal, of course, is to provide information and data that can be used to improve performance without

sacrificing a high level of CSAT.

The theory is sound. Unless your monitoring methodology generates data that links with and corroborates your CSAT data, it fails in its purpose. In practice, however, most monitoring systems do not produce data capable of driving positive results. They lack a critical component - calibration. As with any measurement tool, unless it is properly calibrated, the data it yields is generally inaccurate, misleading, and, as a result, meaningless. Without a way of assuring consistency in the monitoring process, you end up with a "comparing apples to oranges" scenario.

For example, you find that your assessment and audit scores differ significantly depending on who is conducting the audit. Your agents complain that some supervisors are "tougher" than others. Without the implementation of welldefined criteria, every person approaches the task of quality monitoring differently. You're accumulating information, but does it speak directly to objectives? Is your quality monitoring telling you one thing, while you're CSAT data indicates something different? Does the information you receive

equip you to improve performance while driving customer satisfaction?

Why is calibration so important? Because quality monitoring is conducted by people, there is inherent variation in the areas of accuracy, reproducibility and repeatability. The lower the variation, the more meaningful the final scores or data used to measure both the process and the staff who perform the monitored activities becomes. This data can then be used to effectively drive decisions concerning process capabilities: How accurate can the process get? How does process performance affect CSAT? Which forms and questions are the easiest or hardest to use? And people capabilities: Which supervisors or coaches have systemic issues with calibration and require additional training?

Unless everyone is on the same page in the monitoring process, the usefulness of the data generated will be severely limited. Consistency between auditors is an indispensable first-step toward ensuring monitoring results that effectively drive customer satisfaction. Data collected through transaction monitoring typically has little data integrity because auditors



are not calibrated. To deliver an ROI that supports the heavy investment in Quality Monitoring made by most firms, the next generation of QA tools needs to provide more than a "check-box" activity. The best of these tools will supply management with reliable data that relates directly to CSAT objectives. Using tools and a methodology that allow for a consistent calibration system is the key to driving customer satisfaction levels.

The question then, becomes not so much whether or not you are monitoring, but more to the point, does the information your monitoring system generates track with your CSAT data?

As you review and evaluate your calibration methodology, introducing assessments that accurately reflect your CSAT objectives can produce quality assurance scores backed up by customer satisfaction information. As a result you will realize genuine QA credibility that provides the basis for authentic operational improvement and improved, sustainable CSAT.

To achieve these business goals, it is important to seek out solutions that ensure an effective, consistent monitoring process focused on measurement of items directly related to CSAT.

Applications should be evaluated based on their ability to measure valueadd activity to improve performance. Through calibration process implementation, solutions should provide objectively measured consistency among all staff that scores calls. emails, chat, or other agent-provisioned activities. This will equip management with an objective calibration measure, which is the basis for process improvement. By objectively measuring the consistency of auditors, reducing variation among them, and identifying people and process variation, transactional activity data will become more reliable for use in process improvement. As a result, the process will gain efficiencies from the resources being utilized.

Solutions that are successful in incorporating calibration as an integral component of transactional monitoring will provide contact center QM with the missing link between

performance and customer satisfaction. They will empower management to make intelligent, supportable decisions based on data that tracks with and impacts overall CSAT objectives. The result should be a more clearly defined return on their QM investment and a discernable positive impact on overall ROI.

###

#### Pay Attention To Your Call Center and Customer Service Staff and They'll Reward You With Better Attendance!

## Improving Attendance and Punctuality

MarvSue Lucci has been involved in the Teleservices and Direct Marketing Industry for over 25 years. Formerly President and Co-founder of RMH Teleservices, an international call center operation that she co-founded with her partner, Ray Hansell, in the mid 1980's and took public in 1996, MarySue has more than 25 years experience in every aspect of telemarketing operations, including employee recruitment, training, and motivational programs for RMH, and prior to RMH, for companies such as Colonial Penn and Clement Communications.

Currently, MarySue is the

### President and Co-founder of **MaraStar Communications**.

Based in Wayne, PA and founded in 2000, MaraStar produces animated training and communications products for their national and global business customer base, designed to train and motivate employees within the call center and customer

service industries.

#### Pay Attention To Your Call Center and Customer Service Staff and They'll Reward You With Better Attendance!

## Improving Attendance and Punctuality

Attendance and punctuality are always hot issues in call centers and customer service work environments. Because of their direct interaction with customers, front line employees are a call center's most important asset. Managers work hard to staff their centers with the correct number of qualified staff necessary to meet the needs of their clientele and customers. But absenteeism and lateness represent a difficult challenge and can negativly affect customer satisfaction and employee productivity, both of which impacts your bottom

Many call center and customer service managers feel that absenteeism and punctuality are problems with no set solution; after all, you can only control so much, and sub



par attendance and lateness have long been considered the nature of the beast in the call center world. You may be surprised however to know that your day to day communication and interactions can have a direct effect on your team members' attendance.

# Why do call center and customer service representatives fail to show up for work or show up late?

There are numerous reasons why attendance may be poor....some you can affect, and some you can't. Of course, there are going to be times when employees call off due to an illness or a family emergency, but in the call center environment, there is also a danger of low turnout due to burn out, lack of motivation and even lack of interest. It is not likely that your team members will share these reasons with you, but you may be suspicious of these issues if morale is low.

Employee morale factors directly into employee attendance. If you improve employee morale, you WILL improve employee attendance. When people are happy in the job they do, and feel like they are an important part of the company, they are more likely to have consistent attendance and be at work on time. The primary way to build this type of long term employee morale is through consistent and positive employee communication and recognition. Simply put, you

need to show your call center staff positive attention every day, and get them involved! How do you get employees to come to work? Give them things to come to work for!

There are several communication methods that, when done correctly, can sustain positive employee morale, and encourage people to come to work consistently and enthusiastically, on time, ready to perform!

#### 1. Get them involved.

Ask employees for the solutions to the issues your department is facing. In many cases, your employees have the answers to your attendance and morale questions, and are eager to share them with you. When people are asked for suggestions to a problem, they are more likely to be part of the solution.

Talk about the company in a way that tells your staff their contributions are important. People should feel a sense of pride in the work they do; an excellent way to do that is by connecting the work they do every day to customer satisfaction and the success of the company.

#### Celebrate successes.

Find ways to communicate the successes of individual employees, departments and the entire company. Team meetings, employee recognition days, and even simple emails are great ways to tell people what they are doing right.

#### 3. Prepare them for success.

Offer training that is informative, fun and effective. In a call center, training must be highly efficient, but it is also a great opportunity to give your employees a break from their everyday tasks on the phone. For this reason, training should be exciting and refreshing.

#### Provide ongoing coaching.

People want to be good at the job they do. Offering ongoing coaching for performance improvement and career development is a perfect way to pay attention to your team members. Conversations about the work they do and how they perform their jobs are encouraging and show that you care about their success.

## Tell them you are happy they came to work.

Simply, greeting people as they start their shift makes them feel welcome, and let's them know you are happy they came to work, and at the time expected.

#### Have some fun!

Call centers are fast paced and the work can be very repetitive. For this reason, it's important to create friendly competition to keep things lively.

Daily and weekly **contests** and games that focus on attendance, punctuality, sales, quality, and other performance factors are a terrific way to keep performance and motivation high and dramatically improve attendance.

Offer motivating prizes for high achievement in these contests. Prizes can be anything from a free lunch, pizza, dinner at a local eatery, or a movie! Find out what types of rewards will motivate your team members, consider your budget, and create an easy game plan.

How about a specific reward system for perfect attendance? I've seen customer service centers develop an effective and ongoing reward point system for perfect attendance each month. The points can be accrued toward larger prizes at the end of each month. You'll be surprised at the positive impact on attendance these small, but fun, changes can bring! Fun emails and newsletters can further reinforce your point system and contest program by announcing winners on a team and individual basis.

Keeping your customer service staff engaged in friendly competition, where meeting attendance and punctuality requirements means prizes and acknowledgement, will keep your staff doing their job



enthusiastically, every day, and on time!

So, how is the attendance and punctuality in your call center and customer service area? There is almost always room for improvement. Take a look at the ways you are communicating with your employees.

Do you give your staff and their work the attention they deserve?

Do you ask for their ideas regarding the challenges your department faces?
Do you recognize their achievements?
Are you offering training that

helps them succeed in their work?

Are you coaching for improvement and career growth?

Are you creating a fun environment?

To see a positive change in your team's attendance, find ways to pay attention to your employees. The more involved they are with the company and the more communication they receive, the more enthusiastically they will come to work. Give them attention, and they will improve their own attendance!

An ideal way to communicate and involve your employees is to use MaraStar Communications ToonUps.
ToonUps are 30-60 second customizable animations that can be presented in Power Point presentations, emails, intranets and Learning Management Systems. These

animations were designed to communicate company messages, make training memorable, and bring humor to the everyday topics addressed in call centers. They are a great way to give people something to come to work for.

###

The Migration from Customer Service to Sales:
Converting Your Center Successfully by Kimberly King, President, InterWeave kking@interweavecorp.com

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For as long as you can remember, your department has been called Customer Service; and everything your organization is doing has always supported that mission. You hire people who have a "customer service" background. You teach "soft skills" in training to remind people of how to be nice and friendly on the phones. You survey your customers and provide customer service satisfaction ratings to your organization and hold them accountable for these goals. Now you receive a new initiative that sales is also important. SALES? That's never been the mission of your department before and it is now. How

do you start to make the transition from being a service organization to a sales organization? Where do you start and how do you ensure success? Here are the top tips for making this conversion successfully.

#### Identify what you will be tracking and ensure that you have the measurement systems in place.

Identify what sales means to your organization. Does it mean that you will be offering additional products and services? Does it mean that you are looking to drive more traffic to your web site and reduce the number of calls so you are "selling" self-service options? Are you opening new payment centers and you want to encourage your customers to utilize those new facilities, so you are "selling" new company locations? Selling means different things to different organizations. Be sure that you identify what it is that you are promoting and ensure that your systems can track and trend if you are being successful.

## Consider the culture that your language is creating.

Your words and actions create your culture. The name of your department helps to create your vision of the roles of the individuals within the department. Titles, responsibilities and goals also help create your environment. "Quality Assurance" tells people that you are evaluating simply

the quality of the calls but "Performance Assurance" helps employees understand that you are gauging the success of the interaction on your customer's future buying relationship and the success of your business. Look deeply at what your language is saying about your organization its mission.

#### Develop a strong leadership communication and learning strategy.

Too often we focus directly on the front line employees with new initiatives. If you spend time assisting your leadership team in understanding your goals, their buy-in will help you change the opinions, skills and results of your front line. Jumping over your leadership and heading straight for the front line will make any change process longer and more frustrating for everyone. Develop your messaging and continue to live your new culture every day by focusing on the behaviors that will help you drive your success. Ensure that everyone understands what you are looking to accomplish (more traffic to the web site, more up sells, more referrals, etc) and what the benefits are to all the employees, the customers and your business of achieving those goals.

## Sales and Service are not opposites!

Ensure that everyone



understands that the best **Customer Service** Representative is also the best sales person. The mentality should not be "Now I have to sell", the mentality should have always been "I'm here to provide my customers with everyone they need while making sure that I maximize our business' revenue and efficiency potential. The sales and service goals are not exclusive. In order to cultivate a culture that recognizes that sales and service are not exclusive, be sure to once again watch your messaging. If you go to the operation with "sales training" you are sending the message that now you are changing your focus. If you go to the operation with "an emphasis on the behaviors that will help us maximize our revenue potential while providing incredible service to the customers" you will be building a culture that understands the relationship between the two goals.

## Be cautious with incentives.

When organizations make the conversion from exclusively service to include sales as one of the key metrics, the first inclination is to develop an intricate incentive program. It is a good idea to hold back on incentives for several reasons. Your ultimate goal is to create an intrinsic desire to serve your customers more fully. By implementing a program that involves rewards, parties or other incentives

you are encouraging employees to change their behaviors simply to achieve an extrinsic prize. Help your employees gain an understanding of how completely serving your customers while maximizing your company's revenue potential will make them feel and how their own individual skills and knowledge will be enhanced through this process.

## Focus on coaching to behaviors.

Be sure that your entire organization understands the specific behaviors that are essential in driving your renewed focus on selling. Probing, powerful word choice that includes offering benefits and offering alternative solutions are the primary behaviors that will assist you through this transition. But the behaviors that have always been important such as an inflected tone, appropriate pace, and courtesy words will continue to create WOW customer experiences while helping you achieve your sales numbers.

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#### How to Stop Failing at First Call Resolution

by Rob McDougall, P.Eng

President, Upstream Works

Day after day, close to a third of all calls your service center receives are from repeat callers.

What's the reason? Your customer's problem wasn't resolved fully the first time and they are not shy about telling the next agent about it.

When repeat calling persists, those customers escalate to "at risk" customers and are more likely to defect.

Poor performance in achieving higher first call resolution rates was the number one contact center challenge facing more than a third of managers polled in Witness Systems' 2006 National Customer Service Week survey.

Failing to address anemic first call resolution (FCR) rates almost guarantees you will face increasing customer churn and thus hurt the bottom line. Yet, organizations continue to grapple with understanding why higher FCR rates routinely elude their contact centers.

Taking a look at the problem, these are are the five most important factors leading to consistently poor FCR rates.

- 1. The ability of the agent to resolve the issue in onceand-done fashion is not strong enough. This hints at either a training or personal skills issue.
- 2. Your company hasn't provided the authority to agents to make decisions that impact the customer, forcing a continued escalation of tedious, time-consuming, repeat calls to others within your organization who rank higher than the call center agent.
- 3. Your agents cannot find information easily that provides answers or actions for customers. This aggravating situation leads to repeated "look ups" and even giving customers incorrect information.
- 4. Contact center systems don't properly process changes the agents are making, or the changes are processed so slowly that the root problem is still unresolved for too long.
- **5.** Customer perceptions and behaviors are the causes of repeat calls. For example, customers call back trying to get a different result if their account is being suspended.

From the very start, improving FCR rates



requires three steps:

**Step 1.** Conduct an information-seeking "drill down" with experts who are proven resources. They can help determine the best approach in tackling poor FCR rates head-on.

Step 2. Track repeat calls by analyzing agent logs and the IVR system. Identify whether an issue was resolved on the first call and if not, the actual reasons for repeated calls. Look at all customer interface points, because if the customer first contacted you via self-service systems, that counts as a call.

Step 3. Make certain you provide a means to measure FCR from the first day forward. You need useful information to conduct a root cause analysis. What's one ideal outcome? Could it be one where you continue to use the technology now in place — but making it work better for you?

For instance, consider giving your agents onscreen data that allows the agent to determine a customer is shopping around to get a better outcome, "I see a colleague of mine talked with you 5 minutes ago. What did she say?"

Additionally, agents can

ask the customer if the first call resolved the problem:

"Is there anything else I can do?"
"Is this what you wanted?"

These are FCR questions. Agents can keep logs pertaining to them. By carefully tracking agent information, you identify specific customers and the reasons they are calling. Only then can you realistically determine whether this call is a callback.

With IVR systems, customers often find themselves stuck and having to phone back. This is another FCR rate-killer.

Examine IVR transactions and track where calls go. Look at calls and how the IVR is handling them. Far too many customers merely opt to "zero out." That choice, however, isn't giving you interpretable data. Callers choose to zero out for numerous reasons, including their desire to speak with a live agent.

Contrary to some schools of thought, solutions such as VoIP or enhanced IVR are not the Holy Grail in seeking improved FCR rates. At the end of the day it comes down to people talking with people.

Gains in FCR rates needn't

be expensive. One IBM call center burdened with receiving one million customer e-mails annually at last discovered that by making a simple update on the FAQ page on its Web site, it cut that e-mail volume in half. How? IBM tracked the types of questions arriving via e-mail and applied a quick solution.

Better FCR rates remain a top but elusive ROI goal at many contact centers. Track repeat calls. Measure and analyze them using root cause analysis. Put your agents in a commanding "once and done" position, enabling them to resolve any issue within the framework of the first and a single call.

Getting your arms around the true causes leading to poor first call resolution rates is your best initial step in resolving caller issues in the first place. The end result is cost savings and improved customer retention.

About the Author: Rob
McDougall, President and
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Works, has over 20 years of
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s.com and additional
information about First Call
Resolution can be found at
www.upstreamworks.com

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#### On Demand Customer Relationship Management's Role in Call Centers

By Whitney Sommers, Freelance Writer

A call center and its technology is at the heart of every organization that provides customer service activities. Most every business has a call center in some form or another.

Call centers encompass many various applications and individual components - from an informal group of agents handling inbound and outbound customer and prospect calls - to an elaborate grouping of dedicated resources each handling a portion of the company's customer service needs.

Call centers handle customer service;



manage predictive
outbound dialing;
product inquiries; order
entry; financial
transactions;
product/technical
support; pre and post
sales support and much,
much more.

In today's competitive business environment a well staffed call center and the level of Customer Relationship Management (CRM) it provides is paramount to maintaining and growing market share. There are numerous products available – some more flexible than others and some more costly than others - to help businesses succeed in efforts to gain new customers as well as to best manage and maintain the ones they have.

The ASP industry is at it again. Except this time application service providers are building on their success with hosted CRM applications and jockeying for position in the budding computer telephony service provider market, otherwise known as the hosted contact center

market.

The success of hosted software as a service integrators like SaasPoint based in Sunnyvale, CA and Echopass based out of San Francisco has piqued the interest of both on-demand CRM vendors like Salesforce.com and traditional licensed software vendors like Siebel Systems.

For those organizations that have already bought into the hosted model, a hosted call center solution makes a lot of sense. It enables organizations to save on costly call center hardware and software, such as automatic call distributors, CTI, and interactive voice response systems. These costs can add up, especially considering that some companies may have to shell out \$1 million on the technology, implementation, configuration, and ongoing management and that does not include the integration

with legacy CRM and analytical systems.

"What we're now seeing is that there are enough hosted implementations to drive a new round of additional hosted services, such as call center telephony, CRM analytics, etc," says Erin Kinikin, vice president and research director at Forrester Research, "It's not so much that the market is exploding again as that companies that bought the basics are now going back for the add-on offerings."

The overarching issue with hosted customer service solutions is their ability to integrate with the CRM application. This, according to analysts, is why some hosted customer service solutions will cost substantially more than others. For example. SaasPoint uses Salesforce.com's Enterprise Edition, which costs roughly \$125 per user, per month while some other solutions run into the many thousands of dollars depending on configuration.

SaasPoint is a fresh face

in the U.S. market with an impressive history of integrating Salesforce.com solutions in Europe. Its founder, John Appleby is an industry veteran and was the main driver behind Salesforce.com's success in Europe. They are now bringing that same expertise to the U.S. through their newly opened Bay Area office. The company is totally focused on Salesforce.com implementations and as a systems integrator, its mission is to help US firms leverage the software as a service opportunities brought about by Salesforce.com.

According to Jay Noble, recently appointed president of Sasspoint's North American operations, companies recognize their pain but often can't pinpoint what processes need to be put into place to reach specific objectives. "We sit down with our customers to create a success model. Do they want to increase customer satisfaction by 15%, increase productivity of the outbound call center?



Once those questions are answered, we can put a prototype together in a matter of weeks, run a test and give them a working model in 30 days."

Speed and flexibility are essential, according to the Saaspoint team. "The world is changing so quickly and along with it the way companies interact with their customers. A long implementation period has an inherent risk of being out of date by the time it's up and running," Appleby says. He adds that whatever system is in place should be flexible and easy to modify to quickly respond to customer service requirements which are constantly changing.

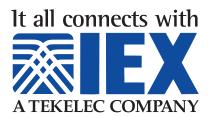
Integrators and analysts agree that hosted solutions makes call center services affordable and easily available for companies that want to implement or upgrade the way they manage their customer interaction. Cost is definitely an issue but equally important is the ability of the integrator to

have a depth of understanding of the business problem and the flexibility to create a solution that meets specific objectives.

To reach this author, Whitney Sommers, please call 585-377-1839 or email editor.assistant@gmail.c om

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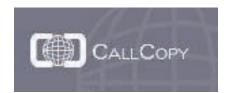


























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