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ONE VIEW OF THE CONTACT CENTER

This white paper explores how to create a toolset that integrates diverse applications and information types with latest Enterprise 2.0 and real-time services. It describes how a unified desktop environment helps contact centers access information and streamline their business process to achieve their business goals.

Introduction

No company wants to be listed in the Customer Service Hall of Shame, MSN Money's annual ranking of companies with the worst customer service. Besides the obvious embarrassment and negative publicity, research shows a direct correlation between the quality of a company's customer service and its stock price. Unhappy customers lead to unhappy shareholders. Poor customer service is bad business.

Contact centers are a critical element in the delivery of customer service. Understanding this, enlightened enterprises no long consider their contact centers solely as cost centers—necessary evils that must be managed for maximum efficiency. Instead, they see contact centers as strategic assets that contribute to customer satisfaction and top-line revenue and should be managed for maximum effectiveness.

This shift from efficiency to effectiveness means not only a new mindset, but also a new toolset. Today's agents and supervisors must contend with multiple applications—ACD, CRM, workforce management, quality management, performance management, order entry, knowledge base, etc. However, the applications reside in separate "silos," each dealing with different information and presenting a different user interface. As a result, agents see multiple views of each customer, and supervisors see multiple views of the

contact center. These confusing, often overlapping displays waste time, degrade service quality and interfere with productivity.

In addition, contact center workers often interact with more than one application to complete a given task, and different roles need different access to features within these applications. For example, agents and supervisors both need workforce management, but a supervisor likely needs extensive access to scheduling and reporting features, whereas an agent need only access his or her schedule and certain shift change requests.

To be most effective, agents and supervisors need a toolset that integrates diverse applications and information types, incorporates the latest Enterprise 2.0 real-time services, and presents everything through a unified desktop environment. If best practices require a user to touch two or more applications to complete a task, the user should not have to cobble them together manually.

Agents should have—right at their fingertips—everything they need to resolve customer requests on the first call, to identify and act on sales opportunities, to build customer loyalty and to strengthen competitive differentiation. Supervisors should have fast and easy access to everything they need to monitor and adjust for performance against goals, quality and brand and to manage contact center resources for maximum effectiveness. This requires integration—not just of the software—but of the user's workflow (Fig. 1).
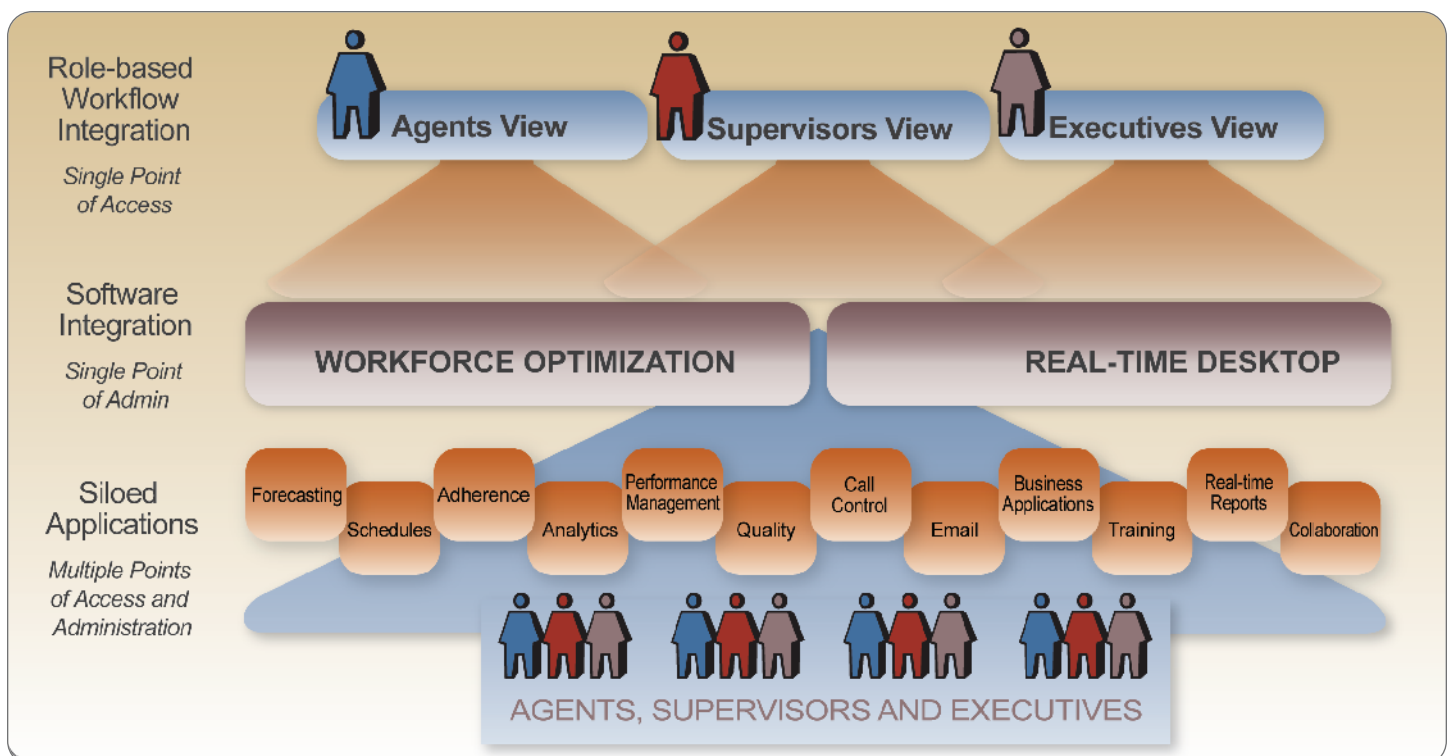

Figure 1. Diagram of siloed vs. integrated applications

From Efficiency to Effectiveness

For years, the quest for efficiency has driven contact center operations. Contact centers were viewed strictly as cost centers, and agent performance was judged by factors such as average handle time (AHT), average speed of answer (ASA) and average talk time (ATT). A typical contact center objective was to maintain a service level (SL) that answers 80 percent of incoming calls within 20 seconds. In short, the overriding strategy for most contact centers was to handle as many customer interactions as possible at the lowest cost per call.

But now this outlook is changing. As stated in a recent **Yankee Group** report, **"Moving Contact Center Strategies Beyond Efficiency and Into Effectiveness":**

> *The market's view of the contact center and its tightly integrated relationship with customer service is quickly shifting from an enterprise cost center, obsessed with the measurement of operational efficiencies, to a revenue-producing asset charged with driving customer satisfaction and loyalty. As a result, the contact center [is broadening] its mission to include improving competitive differentiation, ensuring repeat business and enhancing up-selling and cross-selling possibilities.*

In other words, the quest for efficiency is evolving into a quest for effectiveness. In addition to performance indicators such as SL or ASA, contact centers are being measured on revenue per call, up-sell percentage, first call resolution rate and other indicators that relate to revenue generation, customer satisfaction and customer loyalty rather than just cost.

This new orientation calls for new tools, as further described in the **Yankee Group** report:

> *Top achieving centers will reach [a] level in which effectiveness is optimized, the center is a value-based profit center in a business sense, and there is a strategically effective blend of strategic and tactical information flowing through tightly integrated operational systems enabling peak performance and a high level of customer care. The rise to this level of excellence will require a tight integration of contact center applications, including a pre-integrated suite, one single view of customer information and a unified agent desktop environment that consolidates customer information (objective profile and contextual information) at the agent's desktop. It will also require a contact center supervisory desktop with integrated key performance indicators for monitoring and management purposes.*

Or more succinctly: To be most effective, contact center agents and supervisors need unified desktop environments. Moreover, the unified environment should not only help agents streamline their minute-to-minute activities, but also help supervisors gauge ongoing performance against tactical and strategic business goals.

The Unified Desktop

Today's contact center desktops are far from unified. Agents and supervisors alike must contend with multiple, often overlapping applications. Agents are faced with ACD applications, CRM applications, order entry systems, knowledge management systems, scripting systems, email, instant messaging, schedules and more. Supervisors deal with all of the above plus quality management (QM), workforce management (WFM) systems, performance management systems and others. The result is a confusing hodge-podge of diverse applications delivering different slices of customer, support or product information. To complete a customer transaction or other activity, users often must deal with multiple applications. But each application has its own style of user interface and may generate a different set of key performance indicators (KPIs), and is generally not geared to the role of a specific user (Fig. 2).

Moving from application to application during the course of a customer interaction takes a toll on agent efficiency. Shifting subsets of customer information make it difficult, if not impossible, for an agent to formulate a complete view of the customer. But a complete view is essential to ensuring customer satisfaction, building customer loyalty and identifying up-selling and cross-selling opportunities. Supervisors face similar impediments as they jump from application to application trying to monitor, evaluate and support agent performance. With different applications generating different KPIs, how does a supervisor pull together a coherent picture and make critical adjustments?

There are efforts afoot to relieve some of this confusion by unifying WFM, QM and performance management applications into workforce optimization (WFO) suites. However, these efforts may not go far enough. They integrate the application software and eliminate overlaps, but they do not unify the user interface, and they do not allow contact centers to add their favorite real-time applications or web services. To be most effective, application integration must be accompanied by desktop integration that streamlines business processes and automates best practices. The user interface should provide a unified view that parallels and supports workflow automation, hides any overlap or gaps between applications and makes it easy for contact centers to customize their views.

Moreover, agents should have ready access to anything and everything that promotes customer understanding and aids first call resolution: real-time services like presence, instant messaging (IM) and RSS feeds, modern Enterprise 2.0 services like corporate blogs and wikis, and performance data that helps agents
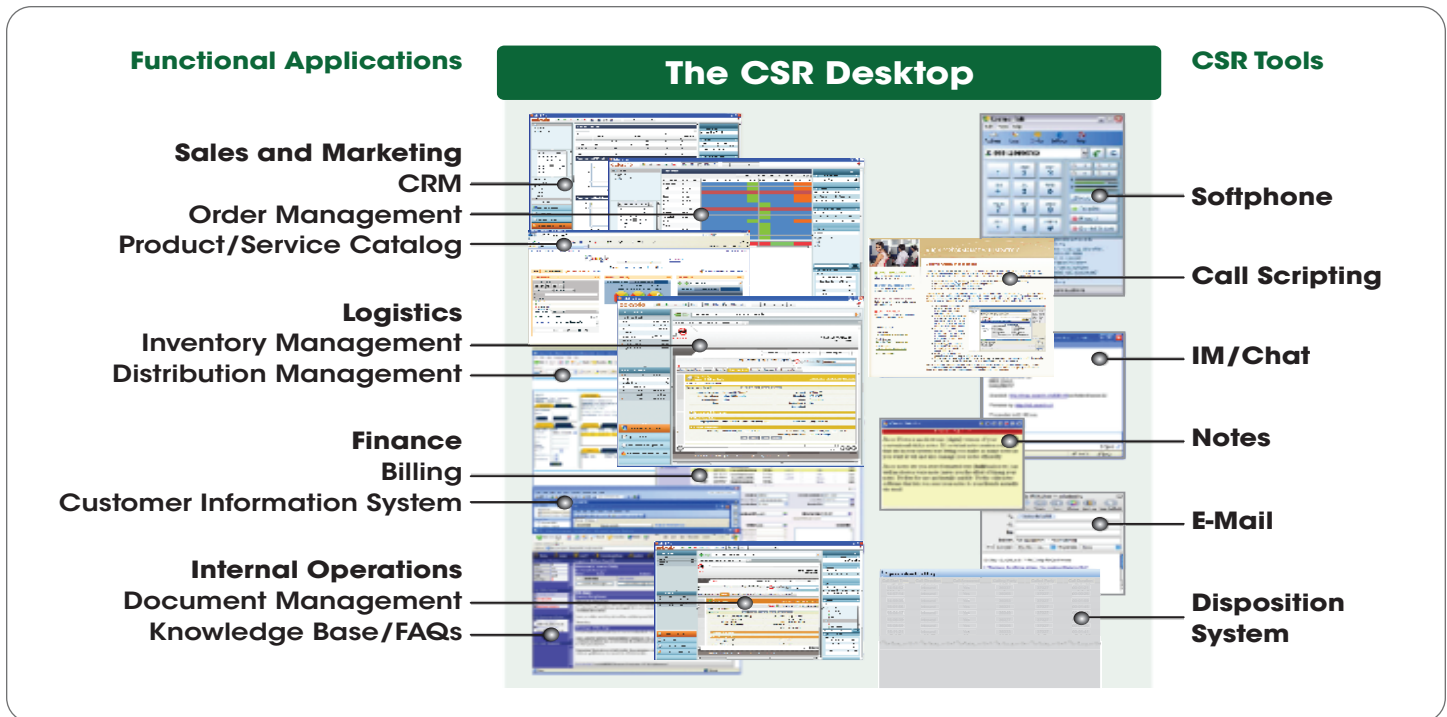
Functional Applications

- Sales and Marketing
  - CRM
  - Order Management
  - Product/Service Catalog
- Logistics
  - Inventory Management
  - Distribution Management
- Finance
  - Billing
  - Customer Information System
- Internal Operations
  - Document Management
  - Knowledge Base/FAQs

The CSR Desktop

CSR Tools

- Softphone
- Call Scripting
- IM/Chat
- Notes
- E-Mail
- Disposition System

Figure 2. Screenshot of multiple overlapping application windows

self-improve. Similarly, to maximize contact center effectiveness, supervisors need integrated information, e.g. KPIs from multiple sources, plus the same real-time and web services that agents find useful.

More Effective Performance

The following examples show how application integration and unified desktops can improve customer service by making contact centers more effective. In each of the examples, the applications exist originally as separate tools. Workers must toggle between applications, determine next steps and integrate the tools and processes themselves. With all of the different tasks a worker must complete in a day, it is easy to see how integrating the tools behind a unified desktop interface can minimize time, frustration and error. These examples are meant only as illustrations. Actual interactions among these and other tools will be unique to each contact center based on its particular transactions and best practices.

Integrated Workforce Scheduling (integrating WFM forecast, meeting schedule, collaboration)

A lot more goes on in contact centers than just customer calls. Agents and supervisors also attend training sessions, group meetings and other ancillary activities. Finding time for these activities and coordinating them without impacting service levels

can be a challenge. Say a supervisor scheduled a meeting and later discovered that the impact on service levels was going to be significant. Typically, to reschedule the meeting, the supervisor would use a WFM program to identify times when the right agents were available, to determine which time would have the least impact on service levels and to schedule the meeting. The supervisor would then use a separate tool to notify agents of the change.
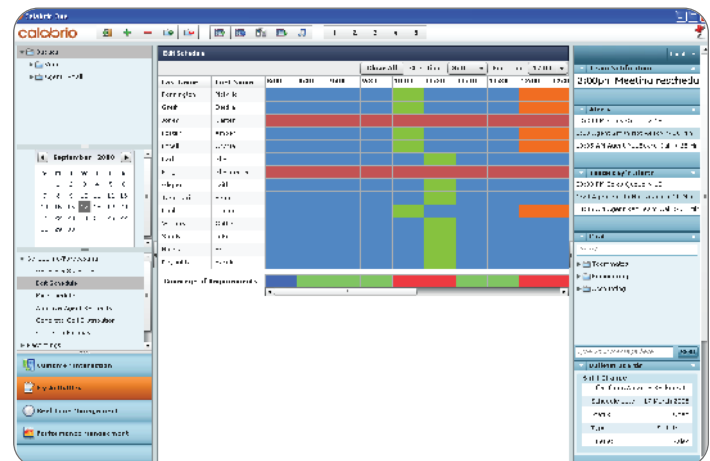

Figure 3. Workforce Management integrated with scheduling and notification

With an integrated interface (Fig. 3), a supervisor could see that, given WFM-predicted call volume and scheduling obligations, the planned meeting would prevent a particular queue from meeting its service level obligations. The supervisor could then use one streamlined process to:

> Select a meeting time with less potential impact on service level,

> Adjust each agent's schedule to reflect the new meeting time,

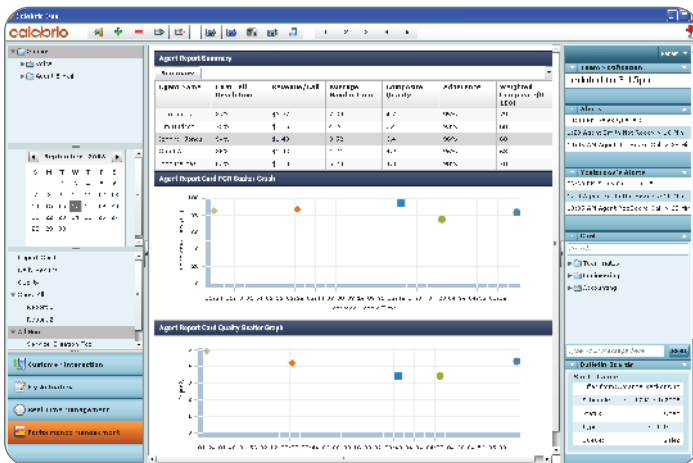> Trigger an automatic alert to tell agents the new time and location.

Figure 4. Performance analysis with drill-down to root cause.

Unified Performance Analysis (integrating performance reports, quality scores)

Agent scorecards record performance against key metrics: first call resolution, revenue, AHT, quality and adherence. But finding the reason for an unsatisfactory score can require extensive searching through multiple data sources and archives. A unified approach more efficiently and effectively relates performance to specific contributing statistics.

With a unified approach, a supervisor or agent first views a composite performance management scorecard with a single value that represents performance in a number of areas: first call resolution, revenue, AHT, quality, adherence, etc. Using a streamlined process, the user drills through the data and views contributing scores in each area—quality scores, for example (Fig. 4). The user then drills down further and views the recording and evaluation of a particular quality score, relating that specific instance to the top-level composite score. The facts behind the top-level score are discovered without time-consuming searches through multiple sources.
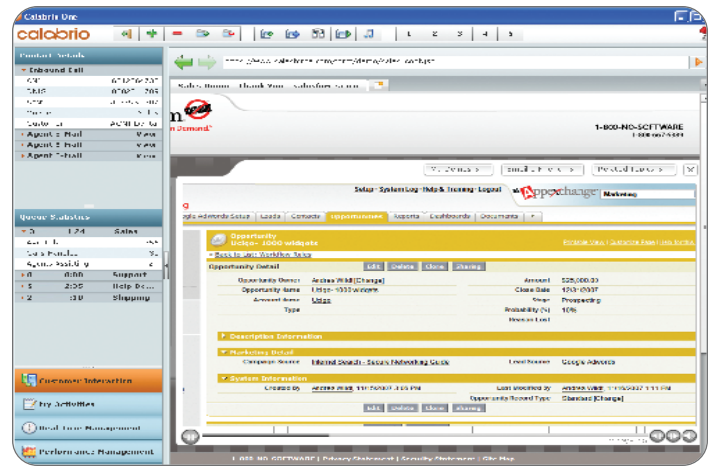

Figure 5. Extending customer interaction to non-agent experts through integrated presence

Accelerated First Call Resolution (integrating CRM, call history, presence/chat, call handling)

Often, agent teams and external contact center resources operate separately, each with its own set of communications tools. These barriers between groups can present challenges when non-ACD workers are needed to help resolve a call.

Typically, if an agent needs outside assistance, the agent puts the caller on hold and phones around the rest of the enterprise to see if an expert is available. This hit-or-miss process can frustrate both the calling party and the agent. By integrating the agent's collaboration toolset with enterprise presence tools, this process is both simplified and extended.

Using integrated presence capabilities, the agent can quickly determine if another agent or expert is available to help by viewing the teammate's current ACD state or presence state and initiating a chat. Call data can also be shared with non-ACD workers for context as well as to expedite the progress of the call (Fig. 5).

As these examples demonstrate, application integration and a unified desktop yield multiple benefits:

> **Improved first-call resolution** – With a unified view of customer information from multiple sources, plus easy access to subject matter experts, wikis and other resources, agents are able to resolve more issues without putting callers on hold, without handing off callers to other agents or support personnel and without requiring additional phone calls.

> **Increased revenue** – A unified view of customer information helps agents identify up-selling and cross-selling opportunities so that they can "strike while the iron is hot" and improve their revenue-per-call performance.

> **Increased customer satisfaction** – A unified view gives agents a better understanding of the "whole customer" so that they can approach each customer as a unique individual and anticipate and respond to each customer's needs more effectively. Together with improved first call resolution, this improves customer satisfaction and increases customer loyalty, which in turn leads to reduced cost, increased revenue per customer and improved stock value.

> **Lower total cost of ownership** – A unified desktop and the integrated applications behind it are easier, faster and less expensive to install and operate than a gaggle of independent applications. Because the applications are designed to work together, integration costs and professional services costs are kept to a minimum. Moreover, flexible architecture makes an integrated system easy to modify and scale as the contact center grows and changes.

Figure 6. Screenshots of toolbar and widget interfaces

Flexible Architecture – Lower Cost of Ownership

Contact centers differ widely. Some are highly centralized while others are distributed. Some employ thousands of agents, while others have just a few. Some have highly specialized roles for each agent, while others assign each agent multiple responsibilities. Plus, each contact center has its own mix of application software. So any system that delivers a unified desktop must be easily adaptable by system integrators and enterprise IT staff to meet each contact center's specific goals and requirements—without excessive professional services cost.

A unified desktop system should accommodate all types of contact center roles—specialized agent, blended agent, supervisor, evaluator, manager, executive or knowledge worker—and several types of client software—rich clients, thin clients, web browsers, *etc.* Likewise, the system should support a variety of user interfaces, integrating applications "behind the scene" and allowing different ways to create a unified view.

Some contact centers will prefer a "container" approach with all information presented in a single, unified window, like the Calabrio One desktop shown in the previous examples. Others may prefer to make a CRM application the primary interface, with other applications accessible through buttons on a toolbar. Still others may prefer to have applications represented by desktop "widgets" (Fig. 6) that users can arrange to fit their personal requirements. In all approaches, the desktop environment must be extensible. System integrators must be able to easily integrate data from new applications and services. And ideally, contact center administrators should be able to customize the unified desktop, dropping in RSS feeds, wikis, blogs and other Enterprise 2.0 services without outside help.

Calabrio One

To facilitate the shift from efficiency to effectiveness, Calabrio is re-architecting its industry-leading Unified Interaction Suite renaming it Calabrio One. Calabrio One integrates WFM, QM and performance reporting within a common desktop. The new architecture takes the model a step further by unifying the underlying information to better streamline user-facing business processes. Calabrio One integrates a rich set of contact center applications for presentation through a variety of unified desktop views. With Calabrio One, each agent has one view of the customer, and each supervisor has one view of the contact center.

Calabrio One provides a unified view of the processes that comprise each user's daily activities. Flexible views will allow users to access applications and services in the way that is most appropriate for their work styles and the company's best practices. Third-party integrators and even contact center administrators have the ability to add other applications or custom "mash-ups" to the unified view. Easy installation and maintenance, automatic software updates, and minimal bandwidth consumption at the network edge, make Calabrio One ideal not only for traditional contact center environments but also for remote workers in virtual environments.