New Solutions for Old Challenges:

*Seamlessly Converge Media in your Contact Center using Proven Technology...Starting Now!*

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Introduction

The goal - Convergence at the user interface

We’re shooting for your business specific application(s) to be coordinated and integrated with all of your users communication means. Having a unified communication interface separate from your business application/CRM system is outside what we consider the “Convergence Zone”, although it may be touted as a converged solution. So, beware of “buzz” words and look at the solution. This is the goal. Your individual circumstances dictate the degree to which this may actually be achieved. It is achievable.

Why write this document?

Education. The greatest challenge we have besides the development of problem solving tools is communicating about unconventional solutions with a marketplace so accustomed to obsolete technology. Any degree of convergence can be achieved easily and cost effectively…with the right partner and product mix. Look at what some of your peers have done. Explore your options. Set aside the sales pitch. Focus on the details of the solution and talk to others who have benefited from the same products. Understanding can only help you.

Enjoy and give feedback

The core of this white paper is a series of real-life examples. We can make our material better through improved understanding of real-world needs and achievements. So, in addition to being welcomed, your feedback is critical to our goal of continuous improvement.
Media Convergence with Business Applications - Essential to Survival

Good TSRs are Gold - Spend/Use Wisely

Since you are reading this there should be little doubt in your mind about the importance of having your communication, in all mediums, tightly and flexibly tied to your business applications. The cost of hiring and supporting highly skilled TSRs is constantly on the rise. Even the best possible agents require reliable and effective supporting technology. If one is to compete effectively human resources must be leveraged by high return activities like working with clients to resolve issues and increase revenues. Things like basic customer identification and provision of answers to frequently asked questions can be left up to computers. If the solution is well designed clients will prefer it over a human. If not, it can be a disaster. You therefore must craft a solution that addresses your unique sensitivities today and will also evolve in the future.

Basic CTI Features

Things like grabbing DNIS and ANI to identify campaigns or customers are only the beginning. Using other real time data and rules to determine and automate the routing and scripting of calls is essential to superior customer service and effective use of resources. While this stuff may sound like a job for the typical ACD, what happens when you want your database application to be completely aware of the identity and status of each call in real time? What about automatically recording all or a portion of a call and indexing it in your customer database as well? What about giving the caller the opportunity for IVR “self help” without losing their place waiting for the next live appropriately skilled agent (maybe even their own personal representative)? The possibilities to improve performance are nearly limitless. The challenge is finding technology that most effectively allows you to implement and change your solutions as needed.

Real World Customer Requirements Today

In the telecom industry there are heavy regulations surrounding sales verification. Often times different verifiers must be called depending upon the locale of the customer. Can you automate a conference call between your agent and the correct verifier with your existing system…if you also had to mute the agent at certain points and digitally record the conversation for instant retrieval?

In the collections industry agents want to make as many calls as possible and quickly call down a list of numbers for a given debtor in quick succession. At the same time they want to be interrupted if a debtor calls in specifically for them. Can you easily automate these types of activities and call prioritizations now?

The world is beyond screen pops and autodialing. You need to be able to blend all common contact center functions into a campaign specific script quickly, easily and reliably to survive in the 21st century. Most conventional multiple vendor telephony solutions do not make this possible.
Conventional CTI - Could Tolerate Improvement

Tradition of Mediocrity

Let’s face facts. It is a rare instance deserving of great celebration when a friend or colleague describes a smooth, reasonably priced CTI installation that does everything the salesman promised. By their very nature traditional solutions (CTI server/T server) that “glue” together disparate telephony systems in an effort to link them with your Information Systems are spider webs…sticky, fragile, environments that often look far more attractive from a distance than up close and personal spanning the chassis’ of dusty old PBX, Voicemail and Call Logging equipment in your closet.

Sport of Kings

This is really expensive glue too. While prices vary widely and many vendors have come and gone, getting any type of serious, comprehensive CTI coordination is out of the price ballpark for the vast majority of contact centers. Many of those who had the funding to take the conventional path have seen their financial performance and stock prices tumble. It’s just too expensive to acquire and maintain the multitude of separate systems and software required to deliver the types of highly integrated Call Processing campaigns today’s typical customer demands, using yesterday’s “integration” approach.

Just add up the time, money and opportunity cost of implementing a solution that includes: Separate PBX, ACD, Voice Mail, IVR, Local and Remote Call Monitoring/Agent Coaching, Call Logging, Predictive Dialing, VoIP Gateway, Multimedia Queuing, CTI Server software, Needed CTI Links on previously mentioned systems (if available), Consulting for implementation of your then current campaigns. If you came up with $15K to $25K per agent, you are probably right.

King’s Horses and Men can’t erase combined limitations of disparate systems

Each of these separate items has it’s own limitations as well as a different vendor looking for a big financial kill. That includes the consultants too, who can cost as much or more than acquisition. A chain is only as strong as it’s weakest link. What we have found is that some of the most exceptional features of the individual systems purchased are rendered useless by the limits of other pieces of the puzzle.

While working with multiple vendors in the converged contact center is inevitable, less is usually more. Choose carefully so as to build a best of breed solution. Use different vendors to bring unique value to your environment, not just to fill in blanks on a feature wish list.

Conventional CTI entails many separate pieces and high cost. PBX vendors bring in “partner” products, increasing the required size of the PBX to accommodate all of the external “boxes” and boosting their profits. With multi-functional New World call processing platforms PBX’s and ACD’s often are not even used in the contact center.

Old World CTI barely delivers the call handling performance of New World solutions, let alone the smooth integration with eBusiness applications and web based communications offered by Convergence friendly products.
Convergence is seamless

The difference between the best New World solutions and traditional CTI is how invisible the “links” (or breaking points) between your information systems and your telephony systems are. How many applications need to be running in the computer’s foreground or background? How many steps must TSRs take to accomplish a repeat task such as a record/script lookup, call transfer, conference or recording? How many devices are on their desk? How many steps, applications and languages must a programmer implement to modify the behavior of the CTI solution, if it can be modified at all?

Converged solutions reduce or bring to zero the answers to the above questions when compared to CTI. A converged solution entails fewer types and pieces of communications equipment. It also meshes with desktop or web based programs behind the scenes achieving the maximum automation appropriate for a given campaign. It will also support a large number of completely different campaigns simultaneously.

Less is More

A quality converged media solution will offer greater capability in a simpler, less costly package when compared to typical CTI “solutions”.

The old CTI or failed convergence model, looks innocent enough:

- Standards based
  - A major operating system
  - Some major database support
  - Uses common hardware
  - Runs on / supports Windows®
  - Visual Basic customization interface

- Lack of flexibility entails piling gateways and additional servers on top to make it “integrate”.

Best of breed Converged solutions are constantly evolving. If you choose a Telephony Server for it’s compatibility with Windows® based development tools like Active X and Visual Basic, what happens when you find a great email response product running under Linux? In today’s fast paced and demanding marketplace do you want to have one component in your contact center broadly limit your choice of other non-competing components in the future? Probably not if you want to operate a world class “best of breed” facility.

Keep out of the “limitation trap”, seek these powerful features in all your contact center systems:

- Platform independence
  - Any/multiple operating systems
  - Any/multiple databases
  - Any/multiple development, customization, integration languages and APIs.
  - Both thin and “fat” client support

- Flexibility
  - Development oriented, rather than high level finished applications
Lower level integration interfaces

Keep in mind that it is not uncommon for executives to tear up contracts based on a salesperson’s false promises (to avoid litigation later). So, it’s important to investigate the detailed methodology of how a vendor supports the crucial “Convergence Friendly” features before moving forward.
Implementing a New World Truly Converged Solution

By seeking out Convergence friendly components for your contact center you will be rewarded greatly. Acquisition and implementation costs of New World, non-proprietary systems tend to be lower, while the performance tends to surpass that of Old World environments.

Your greatest success will result from a well defined immediate and future plan. It is critical to make a prioritized capability list you can work from when evaluating proposals. All options likely will include sub-systems from at least two different vendors. As you evaluate these packages, which capabilities from your list are performed by which sub-system will further enhance your understanding of how convergence friendly components will allow you to achieve a lasting new solution, for your age old contact center challenges, today.

One example of what such an environment may look like is illustrated below.
Real World Solutions

Beyond just theory

The capabilities of modern technology far exceed what most users and vendors actually implement. When evaluating vendor offerings the exact form, general availability and maturity of functions should be investigated.

Convergence Success I - Rooms To Go Furniture with Touchstar Software

Rooms-To-Go based in Seffner, FL with contact centers in Tampa and Atlanta is one of the nation’s most rapidly growing furniture retailers. In it’s quest for superior customer relations they offer multiple contact mediums for customers to communicate on issues like deliveries and quality control. They also take a proactive approach to customer service by calling and confirming deliveries in advance. This avoids unsuccessful delivery attempts and customer dissatisfaction, saving the company thousands of dollars.

Fred Beasley, the call center director for Rooms-To-Go spent many years searching for the correct multi-faceted telephony solution and recalls that when he originally sought a predictive dialer for the Tampa center he found Calltrol’s (then Buffalo International’s) Object Telephony Server (OTS™).

With myriad inbound/outbound, live/automated requirements Beasley’s task was not easy. While there were many vendors talking a good game, few could offer a concise plan to implement these features in a fashion highly integrated with the valuable corporate database applications already in place.

The present solution has fostered many benefits for the company. First year labor savings alone has paid for the OTS™ system AND the company’s phone switch.

Rooms to Go has made extensive use of the OTS™ function suite. This is an excellent example of how a single PC based Telephony Server can truly eliminate 4 or more separate pieces of conventional telephony equipment in a business critical environment.
One example of how productivity has improved is as follows:

“We like to confirm our deliveries before we go out, and give [customers] a four-hour timeframe of when we expect to be there,” he says. “We are using live [agents] to do our confirmation process,” he says.

“When we’re confirming deliveries, we reach about 50% of the people. The other 50% of the time, we get an answering machine. Although agents still reach only 50% of customers live, with OTSTM they leave automatic messages on the other customers’ answering machines. He formerly employed 20 agents to make confirmation calls and now employs 6 agents for this purpose, a 14 person cut!

Agents also call customers after each delivery to conduct a survey about how satisfied they are with the service they receive, and to ask them if they require additional assistance. These calls are now made through the dialer.

Other uses for the new OTSTM system:

Beasley used OTSTM to expand the capacity of the call center’s phone switch. “All of our departments, [like] accounting and merchandise, were on our switch, which was full.” says Beasley. We connected OTSTM to the call center’s phone switch through a T-1 trunk and moved the customer service agents onto the OTSTM server. In addition to expanding his PBX’s capacity, Beasley used OTSTM to provide a touchtone menu for Rooms-to-Go’s customers. “When I started looking for a dialer, I also discovered that [OTSTM] can also be used for some IVR routes” says Beasley. Customers can check order and appointment status by entering their order or phone number by touch tone. This saves time and keeps live agents focused on less routine inquiries.

We have various toll-free numbers to contact different departments or agents who speak Spanish for example. OTSTM takes the DNIS digits [from each number] to route [the call] to a specific group,” says Beasley.

Beasley explains that he purchased the OTSTM communications server from Touchstar Software, a value-added reseller and consulting firm. A team of in-house programmers worked with programmers from The Touchstar Software and installed OTSTM at the first location within two weeks. “The Touchstar programmers added the routing parameters,” says Beasley. “They also gave me some pretty neat features, such as call monitoring.” He adds that after Rooms-To-Go customized OTSTM to its specifications, the company’s Atlanta call center went live with it after a four-day installation period.

For more information on Rooms To Go Furniture’s Calltrol implementation see:
Will Communications Servers Make The PBX Extinct? - Call Center Magazine, Nov. 2000 - By Lee Hollman
An outsourcer of both live calls and email response Innovation Support, Doraville GA, operates two call centers and employs 450 “at-home” agents. The company provides services to a variety of clients and has been using Calltrol’s OTS™ since 1998.

The company expanded into employing telecommuters after developing the necessary OTS™ client applications to support real time CTI from the typical residence.

Randall Romanow, one of the key members of that team and also the owner of Innovation Support recalls the effort that designing the software involved.

“It took about six months before we could begin using the system on a limited basis and another three months to work out the bugs,” he says. “[We wanted to] provide screen pops and data access through the Internet. We approached [several software vendors] about off-the-shelf software for that purpose, and they said they couldn’t do that. The name we gave it is AWARD: Automated Web-Assisted Remote Dialing.”

Innovation wanted to create a very reliable, inexpensive architecture, limiting the investment necessary to get someone up and running from the comfort of their own home. “All the agent using the system from their home needs is Internet access and two phone lines,” said Romanow. “One line is dedicated to voice, and the other to their Internet connection.” Agents log in to a Web site, pick up their phones and hear a confirmation message from our central OTS™ server stating they are successfully connected. Using a web browser agents see a context appropriate user interface showing for example that they’re in queue for the next available call. Agents may join a queue, enter customer information and save it to Innovation’s database.

Innovation Support’s AWARD software works with Calltrol’s OTS™, which the company first licensed in April 1998. OTS™ is software that helps developers build predictive dialers, IVR systems and ACDs. Romanow says that OTS™ enables Award to route calls and customer information to agents whether they are located in the call center or in their homes. It also lets supervisors view call statistics for all agents through a Web browser, store recordings of agents’ conversations, do live call monitoring and agent coaching and listen to conversation recordings from their PCs.

Romanow is quick to extol the virtues of working with remote agents. “The advantage over a traditional mega-center (he is the former owner of a 1500 agent operation) is that we avoid additional brick and mortar costs,” he says. “Every time we want to hire another 100 agents, we don’t need to build more stations.” An additional 30% savings results, because the remote agents work as independent contractors rather than as salaried employees. While he is firmly convinced from this experience that “the days of the mega-centers are drawing to a close” he also believes that live agent contact centers will not become 100% obsolete. There is an important balance between home agents and call center agents that Romanow believes will always exist. Both types of agents work
together on the same calls. Home agents go through the initial presentation, qualify customers and transfer calls to our contact centers,” explained Romanow. “We prefer to have directly supervised “in-house” agents handling sensitive information like credit card and checking account numbers.”

Between 50 and 70 of the more experienced at-home agents are qualified to act as supervisors at any time. Overall and individual performance information and management tools for things like monitoring and quality control are available to them at home via the web. These “remote” supervisors can view information like agents’ hours, the number of calls that agents handle each day and how many sales leads they confirm. Remote supervisors can also listen to agents’ calls and view the information that they have onscreen. They can even coach them over the phone or, if necessary, join the call to assist customers.

A team of supervisors at Innovation’s Atlanta and Norfolk call centers also monitor remote agents and delegate certain tasks to the at-home supervisors. There’s also a separate team exclusively supervising the agents at both traditional contact centers.

The benefits of at-home agents are clear. Not only does it reduce operating costs and improve staffing flexibility, it also enables Romanow to find its workforce from labor markets throughout the US. While they advertise in newspapers and on-line when necessary, most new agents come from word of mouth and referrals from existing agents. The possibility of working from home appeals to many prospective employees, including students and working parents. “Getting agents to work from home is not a problem. We have more agents who want to do it than we have work for them to do,” says Romanow.

For more information on Innovation Support’s Calltrol implementation see:

Piecing Together A Customer Care Network - Call Center Magazine, June 2000 – By Lee Hollman
Of predictive dialing, Mike Pryor, VP of information systems at Calling Solutions, says, “Agents like it because their calls come quickly. Idle time varies with each calling list, but there’s been less of it with all of our campaigns.”

Founded in 1981, Calling Solutions is a leading provider of customized, customer relationship management solutions for Fortune 50 companies. Headquartered in San Antonio, Texas, with over 1600 employees and multiple locations, Calling Solutions' clients include telecommunications, financial, hospitality and technology companies. Calling Solutions makes more than a million outbound calls and receives between 1,500 to 20,000 inbound calls a day.

Since 1987 Calling Solutions has been using Calltrol’s Object Telephony Server (OTS™) to dial and route outbound calls in conjunction with their Nortel Meridian ACD which handles inbound calls. Pryor plans to connect inbound agents to OTS™ soon to take full advantage of it’s call blending capabilities. He estimates that between 10% and 50% of inbound agents at the center will use predictive dialing by next year.

“Our inbound operations manager loves the blending feature because he doesn’t have to place agents in specific call groups,” he says. “We can set inbound calls at different skill levels so that agents receive only the calls that they’ve been trained to handle.”

Companies with large call centers such as Calling Solutions often select a Telephony Server type of predictive dialing system. They appreciate the power, scalability and flexibility that these systems offer. If you’re seeking a predictive dialer that can accommodate a high volume of calls and give you complete control over your scripts, databases, reports and other surrounding technologies, a Telephony Server like Calltrol’s OTS™ may offer the right combination of “off the shelf” performance, ease of implementation, cost effectiveness and internal MIS control.

Calltrol offers OTS™ as software only or installs it on an industrial PC with call processing hardware (mostly Dialogic) appropriate for a customer’s needs. OTS™ provides your center with a robust platform for call routing, call blending and predictive dialing. The predictive dialer runs an algorithm that reviews 20 different factors before it places a call and has yielded performance exceeding some of the most well known competitors in the industry year after year. OTS™ also supports advanced contact center telephony functions internally such as agent monitoring, coaching, conversation recording, conference calling, intelligent and skill based call routing. The system supports thousands of ports whether T1, E1, ISDN, Analog or VoIP and dynamically allocates lines for outbound calls, inbound and agent connections.

Calling Solutions evolved from an inbound telemarketing service bureau to a large-scale provider of outbound, inbound and web collaborative services. Key to their success has been consistent and high quality response to clients. They provide customized solutions on an individual basis rather than modifying campaigns to conform to established formats. The flexibility of OTS™ has been instrumental in this success.

Calling Solutions has maintained the following principles for success: Leveraging leading edge technologies - effecting the lowest cost of goods; maintain efficient operations supervised by veteran managers and incentive pay; create robust client response suites with customized programming; provide rapid and accurate
turn-around on client requests; offer multilingual services; develop focused agents through initial training and concurrent instruction

Rapid turn around on complex campaign criteria and scripting that cannot even be done with other telephony systems has made Calling Solutions loyal to Calltrol’s OTS™. When it comes to supporting Fortune 50 companies, many of which are in highly regulated industries like Telecommunications and Insurance this is critical. Calling Solutions custom develops all of it’s inbound and outbound user interfaces & scripts in Visual Basic. This eliminates scripting, data access and call handling limitations of other contact center solutions.

Calling Solutions typically records both an agent’s pitch and customer acceptance, does internal quality control and uses off premises independent verifiers. These types of campaigns entail complex coordination of conference calling, conversation recording, and supervisory monitoring, all coordinated with logically branched scripts that can often exceed 100 screens. The unified structure and flexible nature of OTS™ permits Pryor to customize these types of scripts at will and deploy changes to agents in the form of a single, simple, Visual Basic application at the desktop. The company plans to switch development environments in the future so that all campaign scripts can reside on a web server. In any event, the OTS™ system doesn’t require modification to address campaign specific needs. It is a true server that runs with the Calling Solutions custom client applications.

Calling Solutions supports a large number of outsource client campaigns that are constantly changing. Visual Basic, SQL and OTS™ provide a virtually limitless environment for customization. Client scripts can exceed 80 screens. For more information on Calling Solution’s Calltrol implementation see: Predicting The Future of Predictive Dialers - Call Center Magazine, Dec. 1999, By Lee Hollman
Conclusion

New Solutions really do exist for Old Challenges

The various companies described have similar challenges to your own:

- Quality
- Customer and worker satisfaction
- Responsiveness to change
- Making a profit

Call control is critical in the pursuit of these ideals in a contact center environment. Call routing, recording, IVR/VRU, Predictive Dialing, Agent Monitoring, etc. are solutions that have been around to address this need for years.

All of the subjects in this white paper have achieved levels of call handling performance that rivals systems costing 5 or 10 times the price. They have been able to achieve telephony and application convergence through the use of New World telephony infrastructure.

Convergence is beneficial

The examples show that when properly implemented, convergence with your business applications yields great rewards. Broad and comprehensive features which to this day typically entail multiple vendor’s separate hardware to implement can integrate seamlessly with the other programs you are running. In all of the cases, retaining control over applications, development platforms and databases has kept these convergence beneficiaries ahead of their competition in performance and cost.

Convergence is attainable

You can do this quickly and for a great deal less than most vendors claim. With the proper “New World” tools your dream solution can be up and running, making you more money.

Become empowered with the proper infrastructure to support your growth into the future.
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