

COMMUNICATING WITH SAM

Call Management:

The Missing Link in e-Commerce



Sam Johnston

Question:

Our company is currently undergoing restructuring to increase profitability, with a main thrust being improvement in customer service both in terms of operating efficiency and customer satisfaction. To support this objective, we want to compliment our e-commerce initiatives by increasing the use of call center technology in order to ensure that we handle voice transactions with the same discipline as a data transaction done via our Web site.

We have numerous disparate departments that handle the various aspects of customer service. These groups often collaborate on a transaction, and we need a technology that can link these groups together virtually while improving how we handle inbound and out-bound calls to customers.

Although we currently do not have a formal call center, we have implemented some basic call center technology to support some of the customer service groups that need to be linked.

With our current PBX, inbound callers get a menu of options and can automatically select some departments related to the customer service process. Should none of the options meet their need, they can default to the inside sales department, where we have some call queue management to route them to the next available agent. The agent, if the customer is calling to do something other than place an order, will transfer the call to the right department, but there is no technology at this point that ensures that the call is handled correctly. If the customer wishes to place an order, the agent must query our AS/400 for customer information in order to execute a transaction.

Our current PBX investment has been in place for several years, and does not have spare capacity. Further, our experience is that the system is not flexible and is quite proprietary making it difficult to link to our databases. Our quandary is whether we should try to upgrade the existing solution, or migrate to a new more current technology that is IP-based.

Answer:

With the waning of the dot-com revolution we have seen an increased focus on understanding how to handle voice transactions. If you recall, the common view during the dot-com boom was that the Web would all but eliminate the need to take phone calls for mundane customer service situations. The world was supposed to become completely self-service and only large scale call centers focused on telemarketing and outbound calling were going to exist in the future.

While we cannot argue with the importance of e-commerce in reaching customers, perhaps we have become more realistic in what we can expect from the Web. Businesses now recognize that the Web cannot replicate the intuitive skills

of a good customer service agent, and that ultimately it is important for customers to have personal relationships with a company.

As a result of the e-commerce revolution, and a willingness to embrace a self-service strategy via the Web, many businesses have not implemented call management technology throughout the enterprise. We have referenced it as call management rather than call center technology to emphasize some of the bias that needs to be eliminated.

Unless a business has a room with a hundred agents telemarketing and handling a high volume of similar calls, they do not believe that they have a call center and often do not see the value in introducing call management technology.

Smart businesses are recognizing that all calls are important, and that the traditional call center, with the repetitive nature of the calls, while challenging to manage in terms of volume, are in some ways less daunting from a quality of transaction perspective.

The real challenge is how to manage unique calls that are handled by those small, fragmented departments dispersed throughout the enterprise. These calls can be expensive to handle, difficult to track, and have the potential to greatly influence the customer relationship. These are the calls that were supposed to be all but eliminated by the Web, and while they have been reduced through self-service efforts, they still exist and often are actually generated by customers who cannot complete Web transactions.

Traditionally, call management technology has not been introduced into these environments, but it is in these areas that we are seeing early adoption of IP call management solutions. Traditional PBX solutions generally have not scaled well for small agent groups, have been expensive to network when linking groups that are disparate or remote to one another, and as closed and proprietary systems have been costly to integrate when it involves multiple applications or purposes. The IP-based solutions, using an open standards Windows framework, have brought flexibility, simplicity in networking and simplified integration when accessing applications or databases that are also open. As a result they scale well and can support disparate groups via a common platform, making the solutions ideal for bringing call management processes outside just the large-scale agent environment. In fact, as organizations become more reliant on strategies such as telecommuting, and our management techniques need to be

virtual rather than hands-on, call management is starting to be used enterprise wide to assist in managing staff to ensure that calls are not lost or mishandled. This is the notion that any employee that makes or receives calls from customers or suppliers is in essence a part of a call center.

Most of the IP call management solutions provide the same features and functionality of traditional solutions such as skills based routing, automated call distribution, sophisticated tracking and reporting, CTI links to enterprise applications and call recording. While the IP solutions do generally scale better for smaller environments, and can be easier to support due to open standards, they may not be everyone. The technology, if fully deployed does inherently assume that you have adopted a converged strategy and are committed to voice over IP, hence, before jumping in you need to assess your converge readiness relative to your plans.

As well, the cost advantage of IP over traditional PBX solutions tends to be eroded in large-scale deployments.

Regardless of the current advantages and disadvantages, it is clear that the future of telephony and call management applications is IP. It is just a matter of time. As a consequence, the market place looks very similar to the AS/400 world in the early 1990's prior to the evolution of the platform to the open standards approach of today. The traditional PBX solutions, while stable and effective, are closed and proprietary, making them costly to support and difficult to integrate to other applications and databases.

Despite this limitation, it has not lessened the drive to introduce and integrate new applications, just as there was a drive to integrate PC-based applications to the AS/400 in the 1990's. Like IBM with the AS/400, the PBX manufacturers will have no choice but to evolve their solutions to open IP standards.



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In fact, many of the traditional suppliers such as Nortel and Avaya have starting introducing IP-based iterations of their telephony and call center applications, while many of the traditional components that made up their solutions have been announced as end of life. This in itself answers part of your question, which is that most legacy PBX systems have a short window of life left from an evolution perspective, hence, you should only deepen your existing investment if it meets two criteria. First, the payback should be short to mitigate the risk of low investment protection, and secondly the existing functionality must meet the medium term needs of your business, as the solution is not likely to evolve further.

If you have a legacy PBX and call center environment, your options look very similar to those of say 1995 when you introduced PC-based applications to your AS/400 world. As described above, you could simply stay the course and increase the investment in the legacy technology to provide additional capacity and applications. In the 1990's, many of our AS/400 customers selected this option rather than early adoption of IP on the basis of the legacy technology meeting the conditions of short payback and delivering the desired functionality. While this option is low risk when looking at the technology as an island, it can create a dead-end if and when new applications appear that have no integration path to the legacy technology, forcing unplanned investments. The other extreme is to "rip and replace" the legacy environment, which can be intrusive and expensive, but also justified when a business is looking for revolutionary rather than evolutionary change. In the middle is the gateway approach, where new applications are built on the new standard and integrated via gateways, just as we used SNA gateways to introduce PC-based applications to static AS/400 environments. Eventually, the legacy will be so marginalized that the cost of gateways will exceed the cost of wholesale change. If this is the course you take, make sure you monitor the evolution closely as hanging on too long can be very costly.

The key to selecting the right strategy is to understand your business needs, as no one answer fits every situation.

Based on your question, some of the key considerations that will influence your decision are as follows:

You will likely need call routing based on the skills of the agents or department to ensure that calls get to the right destination, while you will want to empower customers by enabling them to select options from a voice menu that is provided via an auto attendant or IVR system.

You will need integration to potentially multiple systems to assist in call routing, transaction processing and cross-referencing. For example, you

likely will want a customer to be able to input a customer number, be routed to their customer service agent, and have a CTI application pop-up their account information for the agent for efficiency of call processing.

You will want call and agent tracking and reporting, including the ability to easily mine the CDRs (Call Detail Records) for analysis and decision-making.

You will need the ability to route calls seamlessly between multiple call centers and independent departments, which may be spread over multiple geographic or office locations. Some of the workers may even be remote telecommuters.

The 5th Wave

By Rich Tennant



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"Sometimes I feel behind the times. I asked my 11-year old to build a web site for my business, and he said he would, only after he finishes the one he's building for his ant farm."

You will want to have several disparate groups using the same technology platform, while using different applications specific to their function, creating a need to ideally create several logical call centers within a single platform.

You will want links to the Web, at a minimum to access databases that support the e-commerce side of your business, but also potentially for call agents to chat with users or to even to take calls initiated via the Web site. While return on investment will ultimately drive the right decision, on the surface your needs do appear to justify an IP strategy at least in part. As mentioned, the IP solutions generally provide the features provided by PBX call center solutions, such as skills-based routing, automated call distribution, CTI applications, call recording and supervisory management tools. While some of the additional benefits of an IP-based call management solution specific to your situation might include:

The ability to support multiple agent groups logically via a single platform, making IP solutions cost effective when there is the need to support multiple teams that may be small in size, eliminating the need for multiple investments.

The CDRs will generally be located in an SQL database, which will make for easy data mining and reporting.

Location Independence, meaning that agents can be dispersed throughout geographic areas covering multiple time-zones and language areas, including remote agents, enabling virtual linking of multiple departments to service the customer seamlessly.

If your organization has multiple sites servicing your customers the call can be routed to the best available resource regardless of that resources location.

Deployment of a single IP network throughout the enterprise, eliminating the need for costly leased lines to network multiple call centers by using the corporate WAN and a centralized infrastructure for processing in the same vein as a data center.

IP solutions provide the ability to easily introduce multimedia channels for servicing customers. Traditional TDM based PBXs and call centres cannot seamlessly interface with new multimedia applications like Video, Chat, Web collaboration and email. This results in a cumbersome and expensive TDM integration both with respect to installation and maintenance. Web collaboration, chat, email and video are based on open standards and can easily be integrated into a correspondingly open standard IP call management system.

Whether you chose to migrate all or some of your call center applications to IP, the components you do migrate to IP will be open standards and will generally integrate to your existing legacy systems and future IP investments for maximum flexibility and investment protection.

Open standards mean that you will be able to rapidly deploy new applications access enterprise wide databases provided they are written to open standards such as SQL and DB2 AS400. You will not be dependant upon a vendor writing a specific CTI application for their proprietary system to work with a specific application.

Lastly, the Windows-based open standards architecture will be less costly to administer and support versus closed proprietary systems that require highly specialized skill.

While the world is certainly more self-service today than prior to the adoption of e-commerce, it has also increased the expectations of customers in terms of the quality of the transaction. Our level of accountability to the customer has increased dramatically, and the tolerance of the customer for lost or incomplete transactions, or missing information about the transaction, has been lowered significantly. While many businesses have spent significant resources in ensuring that these needs are addressed in terms of their e-commerce strategy, often the same cannot be said about how they handle and manage voice transactions.

Smart business are quickly recognizing the need to close this loop by spreading call management throughout the enterprise as a general business discipline in order to ensure that poor call management does not become the missing link in their e-commerce strategy.

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