

Finding Successful Implementations

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in the January 2007 issue of *VON Magazine*

Recently, Vanguard has been conducting interviews with companies about their use of IP in the contact centers, and what sorts of interesting and innovative applications they are finding. We're doing this because we want to see if there are patterns of successful (and not-so-successful) applications, and also how IP is helping to prepare for unified communications applications in the future.

Part of our motivation for these interviews is to better understand ways that investments in new systems, especially innovative solutions, can be justified most effectively. What works and what doesn't. In many cases, we find that successful implementations share three characteristics:

- They are customer facing. That is, the investment facilitates direct communication between a company and the its customers or business partners
- The communication links enabled by IP and unified communications become embedded in an established or new workflow or process
- The effect of implementing the communication link is to reduce cycle times or latency by eliminating or reducing the time waiting to reach someone

In many business environments, established workflows pause until the next person in the chain can take action or respond to a request. Consider the steps in getting a mortgage: the applicant completes paperwork; the application is reviewed; the property is appraised; credit is checked; more reviews and approvals; a closing is scheduled; contracts are prepared; the closing occurs and money changes hands. At each of these steps there is a potential delay between the end of the previous occurs and the beginning of the next one.

Companies that seek to be more responsive figure out ways to reduce the cycle times. Methods include automating the flow of information through the process or moving electronic images instead of paper. Many times, however, the challenge is delays in communications - waiting for the next person in the chain to respond to a question. In the mortgage example, consider what happens if the person approving the application needs to get additional information from the appraiser, who is sometimes out in the field, sometimes in the office.

For contact centers, reducing cycle times is an important goal. We usually call it "first call resolution" or "one-and-done". And we see many tools and capabilities deployed to facilitate that goal, including contact management or CRM systems, knowledge management capabilities, skills-based routing, and many others. These tools work well as long as the requisite expertise is available within the contact center structure.

For many applications today, workflows are designed to stay within the center. In fact, in many companies, the ACD resides on a telephone system separate from that of the rest of the organization. In the future, as increasingly strategic work is done in contact centers, this sort of isolation will become less effective. Business processes will have to be organized to reach beyond the center to achieve the first call resolution goal. The tools enabled by IP and UC capabilities will help companies reduce the customer contact cycle times.

We hear about many situations where a caller needs to connect with a specialist who could address a specific issue. The previous process was to take down information and promise a callback. While sometimes that specialist is “on call” and available for an immediate conference call or transfer, frequently he has other responsibilities, is in meetings, or is otherwise unavailable for a phone call. The challenges with the callback include getting accurate information to the specialist, likelihood of requiring the caller to repeat that information, time lag in getting to him, and telephone tag trying to reach the caller again.

Some companies implemented instant messaging (IM) solutions using “buddy lists” so that the availability of the specialists could be immediately checked. This was an improvement, and enabled a contact center agent to conference in a specialist immediately. But IM requires the specialist to be constantly adjusting status and availability information. And then the explosion of “reach” methods adds another layer of complexity – desk phone, cell phone, Blackberry, pager, etc.

Further, in many applications, what’s required isn’t to reach a specific individual, but rather anyone who has a particular skill set. Blink. That sounds like a queuing and skills-based routing problem. We’re seeing companies extend their contact center functionality to include individuals outside the center itself, and making them available on a part time basis. We’ve heard of one company that is, in effect, making the entire staff available to be part of an extended agent pool.

IP facilitates both situations: reaching a specific specialist, and reaching a specialist with a specific skill set. Here are some of the examples we saw where specialists are linked back to the contact center:

- Field staff, such as claims adjustors in insurance companies or appraisers in mortgage banking – “Before, getting hold of a specialist added two days of time to our typical process.”
- Technical specialists, such as Tier 3 and 4 support for medical technology and sophisticated computer systems – “We are using IM today and can’t wait for presence-based unified communications.”
- Medical applications, to reach doctors and nurses – “Sometimes, we have situations where we urgently need to reach the doctor to clarify a patient order.”
- IP enabled video kiosks back to a contact center to provide in-store assistance – “The retail store clerks never really understood our products and would be unable to help a customer interested in the technical details.”

Our interviews show that companies will invest in applications that reduce cycle times for customer facing interactions. IP-enabled solutions have been successful in achieving these

goals. There are many examples, and we're interested in learning about others. If you have an interesting story to tell, write to me. We're continuing to collect examples and using them to drive industry developments. I'd really like to speak with you.

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