

Presence – Making Unified Communications Work

Don Van Doren, Vanguard Communications
in the October 2006 issue of *VON Magazine*

Last month, I wrote about the accelerating interest in the new incarnation of unified communications (UC). Earlier versions of capabilities using that name focused on bringing various messaging functions together. Now, the industry is in the midst of developing a much more comprehensive and definitive version of what this capability should encompass.

The newest version of UC goes far beyond unified messaging, and takes advantage of the functionality enabled by IP convergence. If properly conceived and deployed, the new vision of UC will have far-reaching implications for contact centers and for internal communications within companies.

Announcements over the last year from Cisco, Avaya, Siemens, IBM, Microsoft, and others are defining an all-encompassing concept of UC. The new UC vision that two goals:

- To link all forms and methods of personal interaction including simultaneous and non-simultaneous, through any media, on any device, from any location, at any time
- To simplify and streamline the current explosion of avatars, addresses, aliases, and other ways and things that people need to remember.

Moreover, UC architects envision embedding the ability to communicate in various forms directly into business applications and processes in a way that will make “reaching for the telephone” a thing of the past. For example, in the new UC vision, when you read a Word document or an email message, you can hover the mouse pointer over the author’s name and immediately initiate a communication via voice, email, IM, or whatever is most appropriate.

Even more powerful capabilities will emerge when communications capabilities are directly embedded in workflows or process flows. Already we have the ability for such processes to trigger email or SMS notification. Soon we will see this include voice communication too.

In many cases, these announcements are far more than the next wrinkle in a long line of a supplier’s product announcements and enhancements. Cisco’s John Chambers speaks of redefining his company’s product lines and strategies around this concept. The legacy premise telephony equipment manufacturers are taking bet-the-company steps into this brave new world, as their traditional place in the communications value chain is increasingly eroded. And, new players from outside the traditional communications arena such as Google, SAP, Oracle, and Yahoo are entering the arena by embedding communications capabilities into their offerings.

Merging Communications

Contact centers have successfully harnessed technology, processes, and organizations to create external-facing, customer-focused communications systems whose core functionality is built around the ACD. Intra-company communications systems start with the PBX infrastructure and add messaging and collaboration capabilities. In the past, there has been little interaction between these internal and external systems. As one example, the ACD industry has evolved a number of stand-alone switches that are designed to provide functionality only for the call center, not for other administrative phones.

UC offers the potential to merge these internally and externally focused systems. The first elements of this merger are already at work in contact centers. Increasingly, companies use some form of instant messaging or text chat to enable agents to get immediate help from supervisors or tier two specialists. And, we see more companies deploying these capabilities to enable agents to reach outside the contact center and engage experts in other departments who can provide instant answers or information to callers.

The driver for this kind of access in contact centers is first call resolution – the “one and done” goal that is becoming increasingly important for both customer satisfaction and contact center efficiency.

This ability to access experts who can immediately resolve a problem or provide an answer has clear applicability for internal communications as well. Therefore many of the same tools and techniques used in the contact center will migrate into internal corporate communications channels. Some of the communications will be *ad hoc*; others will be baked into well-defined processes, workflows, and procedures. The goal of all these initiatives will be to eliminate the currently inherent delays waiting for someone to move things to the next step. The result will be shortened cycle times – a core business goal for many companies that can bring huge benefits.

The Role of Presence

Central to the ability to shorten cycle times is the ability to find and gain access to the right person at the right time in the right way. That’s what UC is all about. Within a contact center, this issue is solved by the concepts of agent availability and skill groups that are built into the ACD software. Agents log into the ACD and place themselves in an “available” or “not-available” state. Each agent is identified with a skill set, such as the ability to conduct business in Spanish or knowledge of how to fix the T3X-5500 flibbermimble.

Outside the contact center, however, these concepts of skills and availability are just starting to be developed. People in many companies today use instant messaging as a crude way to find out whether someone is available. We send a quick “can we talk” IM message to someone before picking up the phone. And we know the skills of the individuals on our buddy lists. Contact center agents are starting to use IM to reach out to experts in other departments, and to improve first call resolution.

More generally, the ability to find whether and how someone is available to communicate is at the core of the concept called “presence”. And presence is key to making UC work. All the

suppliers making UC announcements have described how presence information is collected and made available in their systems. And, there is loose talk about “federation” of different systems to share presence information. Unfortunately, there is little consistency yet, no standards are in sight, and everyone wants to own the presence server that will collect, organize, and communicate all this information.

Getting Presence Right

Presence is critical to achieve the goals of UC, both for contact center staff to reach out to other parts of the company, and for internal communications throughout the business. But, this is a daunting challenge.

First, we need much better presence capabilities than have generally been talked about through all the recent announcements. Presence has to be much much more than what we currently get with IM and buddy lists, and will certainly involve some sort of presence server that’s hooked into everything. Sorting out which vendor owns that server will be a challenge, as each company is entering its horse into that race.

Beyond that issue, here are a few presence requirements required to meet my needs:

- I must be able to set some broad parameters for who can interrupt what sort of activities. Also, what devices do I have access to in which circumstances. This should be a setup step with only occasional modification. But, when it needs to be modified, this must be intuitively easy for me to do.
- Current status information has to be as automatic as possible, without requiring me to go in and set my status manually whenever I change tasks. This means communicating and integrating information from a variety of devices – telephone systems indicate that I’m talking on the phone or cell; my desktop applications notify the server that I’m actively working on a document; and maybe my car tells the server that I’m driving down I-95. Bringing all this together sounds like an even thornier problem than early computer-telephony integration.
- My information, stored on a presence server, has to be available across applications and across devices from different suppliers. Although there is a lot of talk about “federation” from the suppliers, my guess is that “some animals will be more equal than others.” That is, companies will figure out ways to use proprietary linkages to provide a richer information set for their own devices.
- The presence server has to collect and track all this status information for each user. But status and availability is different depending on who is inquiring. The server will need to understand who’s asking and display different options to different people in real time. That is, my boss will see different availability and access information for me than a co-worker or a business partner in another company.

There are other challenges. Today’s model of presence is centered on instant messaging and a buddy list. But, a buddy list is individuals. What’s frequently needed isn’t a particular person, but one of a number of people who have specific skills. Contact centers are organized around skill groups; we need to extend that concept to other parts of the business, too. Presence servers

need to encompass both individuals and skill categories. This is a capability beyond current IM, but we are seeing suppliers start to talk about these concepts.

For some applications, presence information needs to be shared between companies. Examples include facilitating communications with partner members of a supply chain, or between a company and its top tier customers. Going outside the company boundaries introduces new issues of security, access rights, and privacy.

Contact Centers Lead

We frequently find that contact centers lag other parts of the company in adopting IP. In presence, however, the centers may lead the change. Some are already using IM effectively. By also extending ACD functionality to experts in other departments, contact centers will gain access and innovate some concepts of presence that will extend to other parts of the company.

To fully achieve the UC vision, however, vendors need to address the challenge that presence presents. In the next column, we will explore what suppliers are currently doing, and how well these initiatives meet what will be required, both inside the contact center and throughout the company.

Don Van Doren is president of Vanguard Communications, an independent consulting firm that helps clients achieve their business goals through better customer contact solutions. Contact Don at dvandoren@vanguard.net or visit Vanguard at www.vanguard.net.