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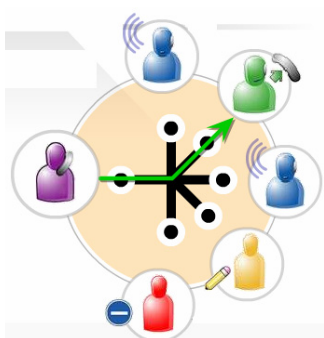


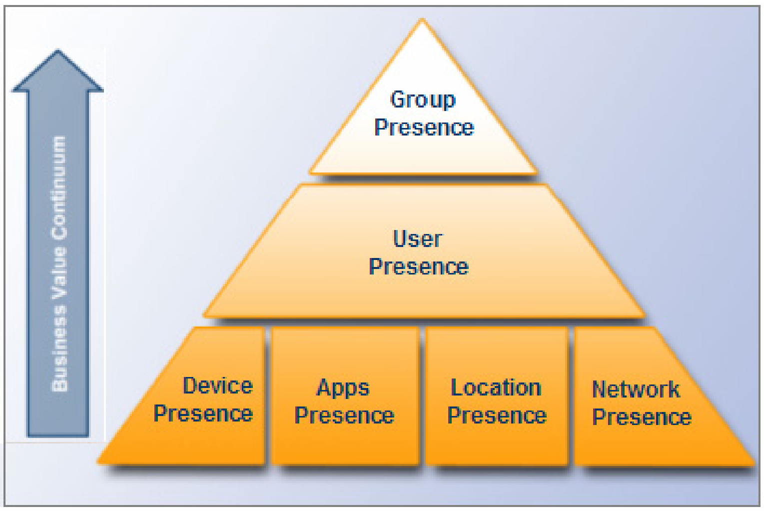
Briefing Paper

The Presence-Enhanced Contact Center

Abstract

This paper illustrates the business value of deploying presence and collaboration tools in the contact center to improve productivity, reduce costs and raise both employee and customer satisfaction. Specifically, presence management -- combined with the ability for call handling agents to collaborate with others in the organization -- yields higher first call resolution, more efficient internal operations and encourages stronger customer relationships.

What is Presence-based Communication?



You are probably most familiar with the idea of presence at the level of what we call "device presence." Examples of device presence include the busy lamp field on a telephone or online status for Instant Messaging. Essentially these tools show a user's availability and perhaps their readiness for communication.

But device presence only monitors the user's presence from the standpoint of a specific device without providing status information about the user, particularly if they have stepped away from the device or are engaged in other activities that prevent readiness for communication.

That's why "user presence" is important to provide more complete picture of the user's status within the context of their work activities or physical environment. For example, in a customer contact center, it is helpful to aggregate a view of a team member's voice presence status (talking, available etc.), as well as an overall presence status, such as "on break" or "in a meeting," or "working on call follow up".

User presence offers a much more complete, holistic view of the presence status. Beyond that, Group presence enables users to logically group and view the availability status of users based on their department, skill set or subject matter expertise. For example, when seeking an authorization from a claims adjuster in an insurance company contact center, the Group of adjusters may be reviewed to identify who might be ready and available to communicate at that moment.

Then, communicating with an available member of the group can be initiated by a simple point and click using software-based collaboration tools.

Siemens sees this as a sort of "presence pyramid" that, when used together, offer the potential to have a positive impact on business processes and employee productivity.

Why Do We Need Presence-Enhanced Contact Center Tools?

Driving First Call Resolution

As business models evolve, many responsibilities that were previously executed face-to-face in the field by specialists are now consolidated in a company's contact center. The good news is that if well executed, customers have access to 'one-stop shopping' through the contact center for sales, support and service related issues. The accessibility and lower cost per interaction of the contact center also provide business benefits – assuming that customers are fully satisfied when they choose to contact your company by phone.

Industry research shows first call resolution remains a key business objective, driving both contact center productivity and customer satisfaction. According to a 2003 study from industry group *Call Center Managers Forum,* first call resolution has been found to be the single most important challenge to improving customer satisfaction. Further, *failing* to achieve first call resolution accounts for a minimum of 30% of a contact center's operating cost, due to repeat calls and the extra time and 'churn' spent trying to find the right person to help the customer in need.

A cross-section of industry studies indicates typical first call resolution rates are approximately 60%, meaning 40% of inbound and outbound calls are repeat calls. In complex service and support environments, additional contact with other company personnel – such as subject matter specialists, those closer to the customer's situation or with a higher authority level – is required up to 70% of the time in order to resolve the call.

What this all means is that achieving first call resolution on complex, exceptional or sensitive issues and opportunities often requires knowledge, expertise or authorization beyond that of the answering agent in the contact center.

Conventional thinking has been that more effective call routing, improved agent training, and the use of knowledge tools will drive first call resolution. This might be the case for routine or simple calls, but as we said earlier first call resolution still hovers at only 60% on average. And, those routine or simple calls may be more efficiently handled by an automated system such as an IVR or Web-based self-service.

Tools that allow the answering agent to more effectively collaborate with peers, supervisors or experts outside the contact center are critical to achieving first contact resolution and driving higher value customer interactions. The answering agent will also feel less frustrated and more satisfied with their ability to perform, if they have the communication tools that facilitate connecting the right information and people with the caller, in real-time.

Once 'what the customer was calling about' is effectively dealt with, the door is opened for possible agent initiated cross-sell or up-sell dialog or soliciting survey or needs feedback.

Customer Relationship Building

Beyond that, many customer relationships are based on personal contact, where dealing with the same individual over time or repeated contacts helps expedite the resolution and forms a stronger bond between the company and its customers. This is particularly relevant where an ongoing business-to-business 'assigned representative' exists, or where a consumer has an ongoing case or situation to resolve, such as an open insurance claim.

However, given call routing strategies the answering agent may not always be the one who owns the account relationship or has been previously handling the customer's situation up to that point in time. Therefore, the answering agent needs tools to determine whether the ‘incumbent’ agent or representative is available at that moment to accept a warm transfer. There are efficiency gains also, as the customer does not have to start over from the beginning in explaining their situation or needs to a new call taker.

Internal Monitoring and Communication

Managing contact center operations effectively requires minute-by-minute attention to operations to ensure metrics like available agents, target service levels and wait times are maintained. When action or intervention is required by team leaders, supervisors or management, presence and collaboration tools provide real-time information as to who is available to take action or manage a situation. This removes the vagueness and potential delays in attempting to manually or physically search for whoever is ‘on duty’ and available to immediately get involved in an operational situation.

The Call Taker’s Challenge

Given the range of questions, issues and opportunities each incoming call may represent, today’s contact center agent or call handler’s job is very unpredictable. Often they must rely on the broader skills and knowledge of their fellow agents or expertise throughout the enterprise to effectively handle a customer situation.

However, it can be equally unpredictable for the agent to know who else is available at the moment of need, ready to assist or collaborate with the right skills, authority or knowledge to address the call on first contact.

How does an agent quickly determine the availability status of particular peers in the contact center or other business users in the enterprise? The cumbersome guesswork of trying different extensions, physically looking around to see who is or is not currently on a call, on lunch or on break can make efficient call handling, consultations or warm transfers difficult. In a distributed environment (i.e. remote or home-based agents), or across departments, this becomes even more difficult, if not impossible. If the right person is not identified quickly, frustration ensues for the customer and promised callbacks may or may not ever happen on a timely basis.

Productivity and efficiency go down, along with customer satisfaction. Sales opportunities may be lost if your competitors can resolve everything on the first contact.

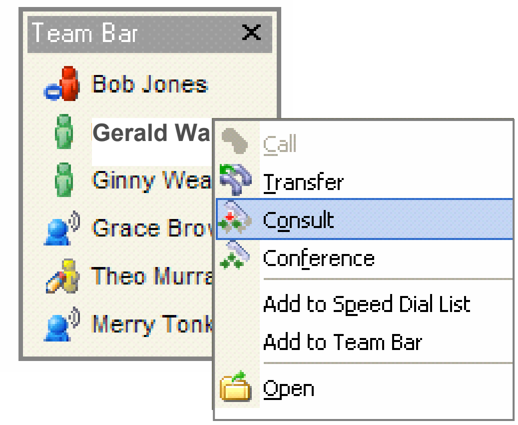
Introducing Presence Management to the Contact Center

Having looked at today’s challenges, now let’s introduce presence management and collaboration into the equation. The four scenarios that follow will illustrate how common call handling dilemmas are addressed in new ways through presence management tools.

Business Scenario: *Insurance Claim Resolution*

A customer places a call to her insurance company to enquire about the status of an existing claim. The answering agent finds that Gerald Wander, the claims adjuster who is handling the customer’s claim, is the best person to help answer the customer’s enquiry.

She sees that Gerald is currently available, using the Team Bar. The answering agent then conferences in Gerald, which automatically produces a 'shared' screen pop of customer call details on Gerald's desktop.

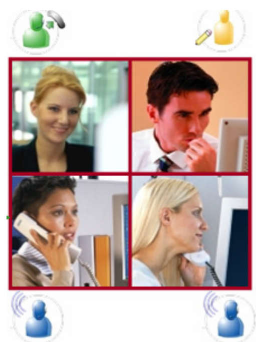


When the customer issue is resolved, the answering agent enters wrap-up reason(s) and disconnects.

Extending this scenario, imagine if the claims adjuster was currently in the field rather than in the office, and using a mobile phone. In this case, enterprise-wide presence tools become critical as we need to collaborate with a broader range of mobile users using diverse communication devices such as PDA's or mobile phones.

Business Scenario: *Satisfying Billing Complaint*

An agent in the "Billing" group receives a call from an upset customer, requiring special authorization to remove a questionable service charge on their bill. The agent requires immediate authorization from a senior billing agent to allow removal of service charge – there are four senior billing agents on duty, of which only one is currently available for consultation.



The senior billing agent is then engaged in real-time consultation with the agent, and provides the approval required to resolve the customer's issue on first contact.

Possibly, a customer situation may require a higher level of authorization than a senior agent. For example, a product manager may be required who is currently out of the office -- but still connected via wireless PDA. We could use broader enterprise-wide presence and collaboration tools with instant messaging (IM) capabilities to solicit the required approval and resolve the situation in real-time.

Business Scenario: *Complex Technical Support*

A customer calls the ABC Server Company's support desk with a question on a server he had recently bought. The agent identifies the question as highly technical, and not being able to resolve the customer issue on her own, conferences in a technical expert.

The available expert, one of the company's server specialists, is conferenced-in with a single mouse click using collaboration tools.

He is able to resolve the customer's problem right away. The expert leaves the call when the technical issue is resolved, leaving it up to the helpdesk agent to wrap-up the call with the customer, and possibly provide an up-sell offer.

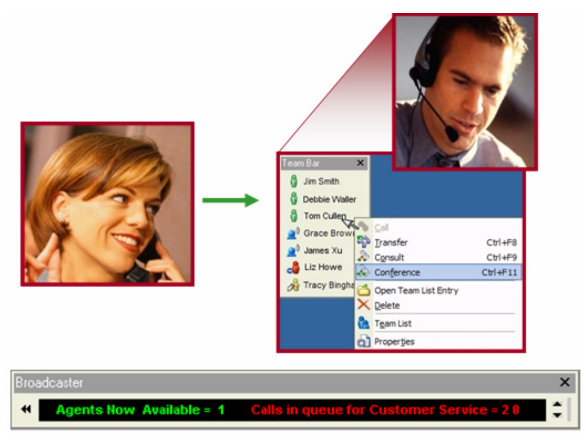
If the customer's problem happened to be very unusual or complex, (i.e. beyond the capability of the second-level server support team) enterprise-wide presence tools would help us identify the availability of a subject matter expert, perhaps an R&D engineer, who could assist in resolving the customer's issue.

Business Scenario: *Managing Operational Crisis*

VP Customer Service notices serious increase in customer wait times and calls in queue, and sees very few agents currently available. The VP confirms Tom Cullen, one of the supervisors on duty, is available and initiates contact via the Team Bar. Tom is advised of situation in real-time, and notifies overflow agents to log on as 'Available' immediately via instant Broadcaster message to targeted users.

The overflow agents handle the increased call volumes, returning the call center to target service levels and avoiding abandoned calls.

In general, day-to-day internal communications productivity can be increased just by having real-time visual information on who is reachable at a particular time, rather than trying different extensions and/or leaving voicemails.



The Presence-Enhanced Contact Center

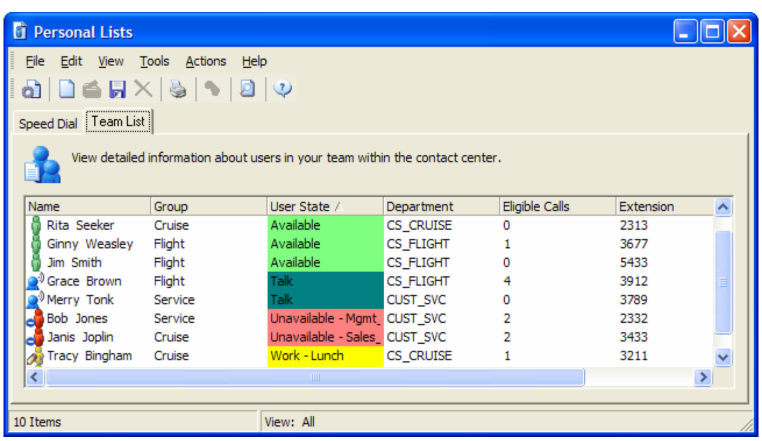
The Siemens HiPath ProCenter Agile contact center solution integrates a customizable presence-enhanced desktop application that allows the user to visually identify the presence and availability status of other users in real time.

So, when the inevitable need for a warm transfer, consultation or collaboration is needed on a call, the agent can visually confirm the relevant user's status, and simply click on the available user to confidently initiate a transfer that will connect the caller with the right person at the right time.

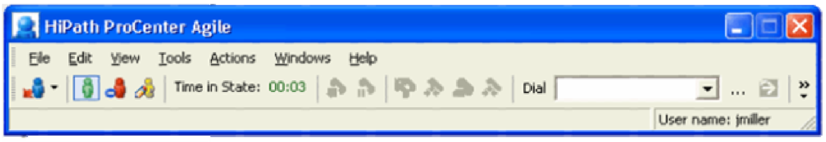
Tools that identify the presence and availability of peers or other in-house ‘experts’ that can help close calls on first contact are also critical. When call takers can immediately identify who is available to help out in real-time, and conference or consult with them using a single mouse-click, productivity is greatly increased.

Likewise, customer or caller satisfaction can be greatly increased by avoiding cumbersome callbacks, unnecessary call transfers or lengthy hold times while call takers search for an available party to assist in call resolution. Beyond better call handling, the cost of doing business is reduced through shorter call handling time, fewer callbacks required, and leveraging existing investments in PCs, networks and databases.

Beyond the core call handling group(s), there are many users (such as knowledge workers, experts, back-office personnel, part-time agents or managers) who may need to both monitor call handling activity and be accessible to collaborate on customer issues or opportunities as they arise.



To help drive first call resolution, users can leverage the Team List feature to view the real-time presence and availability of their peers, supervisors or experts across the company, and consult or include them on a call with just a mouse click.



For occasional call-takers, or those who are frequently required to assist or collaborate in resolving caller situations, the Associate desktop provides the key tools to participate in effective call handling.

By being connected to HiPath ProCenter Agile system, the Associate desktop provides a streamlined reduced feature set, but is still tied into a company-wide communication fabric.

The Associate desktop also provides soft phone telephony productivity tools, and the ability to monitor the presence and availability of other users within the HiPath ProCenter Agile system. It is ideal for users who may take calls less frequently, or will be needed to accept transfers, consultations and conferences to resolve incoming calls.

Monitoring the Presence and Availability of Other Users

Agile provides detailed user state monitoring, along with associated ‘reason captions’ for users currently in Work or Unavailable states (e.g. in sales meeting, on a break, researching a problem etc). These helpful reason captions are configurable so that your users can more easily understand whether another user might be available shortly, or is interruptible.

Talking – user is currently engaged on a call

Working – user is currently engaged in other work and not taking calls at that moment (with reason caption)

Available – user is logged in and available to take calls immediately

Unavailable – user is currently engaged in activity such as meetings, lunch, break, training (with reason caption)

Logged Off – user is not logged on, therefore not accessible to the system

Presence and Collaboration Across the Enterprise: Siemens HiPath OpenScape

In the previous business scenarios, we also saw how circumstances may require access to presence and collaboration capabilities well beyond the ‘proper’ contact center and customer support community. To logically extend the presence capabilities of HiPath ProCenter Agile, large numbers of users in the field, in other departments or at other locations may be linked together to help address customer issues using the innovative Siemens HiPath OpenScape solution.

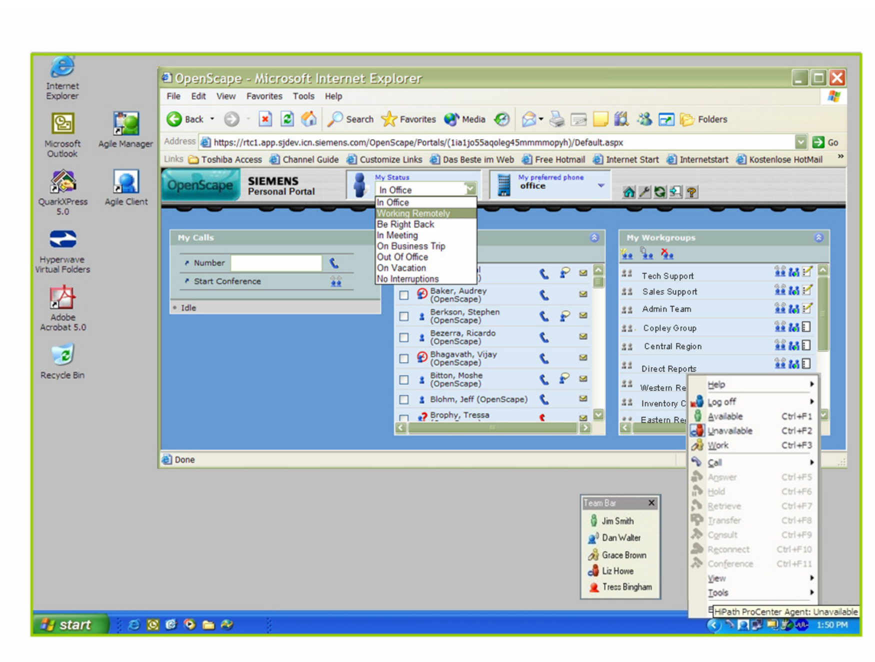
OpenScape brings up to 2,000 users together – including mobile users – using a spectrum of media and devices, including mobile voice, wireless PDA and instant messaging (IM).

HiPath ProCenter Agile and HiPath OpenScape Working Together

Combining the presence and collaboration capabilities of Agile and OpenScape yields some compelling new ways to address customer sales and service situations. In the following scenario, a business-to-business contact center receives an unusually large order request from a new customer, without prior notice. Fulfilling the order would require special manufacturing runs and overtime, while also displacing the company's planned production schedule. Meanwhile, the customer is asking for confirmation on availability right away – or they may take the urgent order to an alternate supplier for fulfillment. How does the company respond?

The contact center agent receives the incoming customer call using the Agile Agent desktop. Recognizing the production and inventory impact of the customer's order request, the agent immediately seeks the assistance of one of the supervisors on duty in order to seek authorization to accept the order.

The agent uses Agile's Team Bar to isolate an available duty supervisor and initiates a voice consultation, with a shared 'screen pop' of key customer information.



The supervisor realizes this order volume exceeds his level of authority and must seek approval from the vice president of production, who is currently out of the office on business travel.

Given the time sensitive nature of the sales opportunity, the supervisor uses his OpenScape desktop to identify the status and availability of the vice president of production. OpenScape shows the vice president as traveling on business but available in real-time for mobile instant messaging and, according to configured rules, selectively available by mobile phone to members of the supervisory and management team.

Using OpenScape, the supervisor initiates an instant messaging dialog highlighting the customer situation to the vice president. After an exchange of messages, the vice president briefly exits his current meeting and accepts a call from the supervisor via mobile phone. Upon understanding the risks and opportunity related to the urgent customer order, the vice president uses Web access through his PDA to authorize the dedicated production run required to secure the order.

Now, the agent can now see the order approval in the system and quickly close the loop with the customer. The agent is able to confirm to the customer in real-time that the company can fulfill the order and there is no need to seek an alternate supplier for their business.

HiPath ProCenter Agile - Summary of Presence and Collaboration Capabilities

- Presence-based communication tools – one-click-to-communicate, within the Contact Center and beyond
  - Save time and money by avoiding unnecessary callbacks
  - Maximize the effectiveness of your user's actions
  - Eliminate unsuccessful, unproductive transfer / consult / conference attempts, transfers to voicemail
  - Facilitate first contact resolution, enhancing customer and agent satisfaction

- One click to collaborate: call, transfer, conference, consult with any user in the Team List or Team Bar

- List of up to 25 monitored users on each user's Team List or Team Bar is configurable per user through the HiPath ProCenter Agile Manager application

- Right click any entry to add users from the Team List to the Team Bar

- Display real-time presence and availability information either as part of the Client desktop or undocked, anywhere on screen

- User can choose which members are displayed in the Team Bar

- Associate desktop
  - An ideal desktop for experts or knowledge workers, informal or 'part-time' agents
  - Extends call center communications to the enterprise for first contact resolution
  - Provides communication and telephony productivity tools
  - Streamlines the Agent feature set with smaller 'footprint'

- **Features**
  - Team List and Team Bar – real-time visual indicators of team member presence and real-time availability status
  - Single click to collaborate on customer call (transfer, consult, conference) with shared 'screen pop' of caller contact information
  - Targeted *Associate* desktop for the 'extended' contact center user

- **Benefits**
  - Improved agent productivity by avoiding manually 'hunting' for an available party to assist in call handling
  - Reduced customer hold time, re-queuing, blind/dead transfers or transfers to voicemail
  - Avoid unnecessary callbacks by facilitating first call resolution
  - Improve customer satisfaction and retention

About Siemens HiPath ProCenter Agile

HiPath ProCenter Agile is a full-featured contact center solution designed for the needs of small and mid- sized enterprises. As a ‘ready-to-run' solution, Agile is easy to implement, configure and use, delivering intelligent call routing, graphical reporting, and innovative productivity tools for both call handling agents and managers.

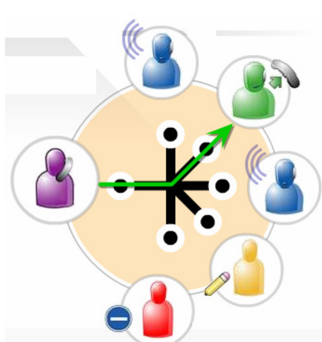
Agile provides unique presence and collaboration tools such as the Team List and Team Bar to expedite call handling, increase first contact resolution and improve customer satisfaction.

Innovative desktops extend these capabilities flexibly across the enterprise. The Agent and Associate desktops are intuitive, graphical user interfaces providing communication tools for more effective call handling. The HiPath ProCenter Agile Manager application unifies all administrative and management tools in a single desktop. Included in the Manager desktop is a graphical Design Center, a visual design tool for routing strategies and call and queue processing flows. Also, Agile's Report Center provides a robust reporting engine with easy to build, customizable visual reporting and built-in trend analysis.

As your needs grow, HiPath ProCenter Agile allows evolution to more advanced solutions within the HiPath ProCenter Portfolio.

About Siemens HiPath OpenScape

HiPath OpenScape is an open, presence-aware, real-time communications software suite designed to quickly and easily synchronize people and information to facilitate action or decision-making. HiPath OpenScape will help enterprise customers take control of the escalating costs of business transactions by eliminating unproductive steps in the communications process and enhancing the conferencing and collaboration capabilities of the information worker (iWorker) community.



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