

CRM

CRM integration in Unified Agent- Desktops

Contact centers face ever-increasing demands from their corporate masters. They are continuously asked to do more with less. With so much expense and effort spent on improving and maintaining agent performance, customer service and support solutions are being developed with the user interface and customer experience in mind. Contact centers are empowering agents with information through customer relationship management (CRM) solutions in order to improve the customer experience.

This report refers to an extract from Datamonitor's report, "CRM in the Contact Center and the Emergence of the Unified Agent Desktop (DMTC2207)", September 2008. The report assesses the current trends and market opportunities for CRM and unified agent desktop applications. It provides market sizing and forecasts for hosted and premise-based managed CRM, as well as giving regional breakdowns. It includes some of the key market trends and drivers. There is a short excerpt taken from the competitive landscape with a summary of Jacada's solution and strengths. Datamonitor's analysis of trends in this market has revealed the following key findings:

- Contact centers are investing in tools that help improve customer retention;
- There is a growing demand for better user interfaces and easier access to customer information;
- Spending on CRM solutions in the contact center is growing steadily through 2013;
- Analytics and real-time predictive response solutions will play a greater role in the contact center;
- Integration in the contact center is paramount moving forward.

KEY MESSAGES

Contact centers are investing in tools that help improve customer retention. Enterprises are changing their contact center strategies. Previously, they were focused on cost cutting and making contact center operations more efficient. Metrics such

as call handling time and number of calls answered were used to determine performance. However, after an increasing need for compliance and the tightening economy, enterprises are placing more importance on customer retention and providing better service. Regulations such as Do-Not-Call lists, The Health Insurance Portability and Accountability Act (HIPAA) and initiatives such as GetHuman are forcing enterprises to change the way they approach strategic contact center investments. Enterprises need to equip their call center agents with more information and easier to use desktop applications so they are able to provide better information to customers.

This is driving adoption and upgrades of CRM solutions in the contact center. Enterprises are using CRM applications and unified agent desktop solutions to consolidate customer information and monitor agents' interactions through analytics and reporting. Understanding the customers' requirements and improving business processes to meet customers' needs are top contact center priorities. Enterprises are continuing to invest in CRM solutions in the contact center and are upgrading old customer service solutions to gain new features and unified desktop solutions. Customer service and support applications make up a significant proportion of the total CRM market. The contact center CRM applications and services market will increase a CAGR of ten percent between 2008 and 2013, with adoption of hosted CRM and

unified agent desktop solutions growing at faster rates of 14 percent and 23 percent respectively over this timeframe.

Although the uptake of unified desktop solutions is gradual and the market is currently immature, there has been uptake among telecommunications and financial services organizations. In industries such as financial services and communications, products have become commoditized and customer service delivery is becoming more of a differentiator for companies. In addition, enterprises need a tight data security. With unified solutions they are able to control the information that agents are able to access.

CUSTOMER SERVICE – A MAJOR PAIN POINT FOR MANY ORGANIZATIONS

Across industries, there have been a rising number of mergers and acquisitions which has resulted in difficulties with integrating legacy systems and applications. This has led to the delivery of inconsistent customer service and in doing so has become a major pain point for many organizations. Unified solutions create

- a better user interface, while
- providing the right information to agents so they are able to
- upsell and cross-sell products more effectively.

There is a demand for better user interfaces and easier access to customer information: The number of channels and technologies feeding into the contact center has increased over the last few years with the proliferation of web and

» mobile devices. The use of DTMF IVR is widespread and enterprises are introducing web chat, speech recognition and now mobility into their customer service solutions. Meanwhile, customers can access information and conduct transactions through all available virtual channels such as web and phone self-service. When they call the contact center it is usually for help with more complex inquiries or complaints, classical inbound. Therefore agents must be more knowledgeable and better equipped to provide help and guide customers through issues. This has led to traditional CRM vendors developing unified desktop solutions and a growth in the number of smaller niche vendors that provide specific applications for this purpose. The unified agent desktop aggregates information from contact center, billing and back-office applications and brings these elements together in one interface to make it easier for agents to find historical customer information and provide a better service.

MARKET OPPORTUNITY UNIFIED AGENT DESKTOP

The 'unified agent' desktop is emerging as a solution to solve the problem agents have with navigating through several applications at once to access information. In the course of a single interaction, an agent may use numerous applications, including homegrown industry-specific applications, traditional CRM, financial and as well logistical applications. The unified agent desktop aims to bring all relevant information into one user interface, to make agent-customer interactions more seamless and reduce hold time for customers. The agent will have a single point of reference for all customer information and one set of login details. This reduces the constant switching between applications to get different sets of information so the agent becomes more efficient at dealing with customer queries and customer hold time is reduced. These unified solutions work alongside traditional sales and marketing CRM applications but can also be deployed instead of traditional CRM solutions, mainly for smaller enterprises that do not have legacy CRM in place. Enterprises are investing in technology to enable the contact center as a tool for customer retention. In the past, the contact center has been used to drive sales of new business through cold calling, or merely as an information center to provide custom-

ers with basic assistance. However, legislation such as 'Do-Not-Call' lists and The Health Insurance Portability and Accountability Act (HIPPA) have changed the contact center from a sales hub to a fullservice customer service center. In addition the customer pushback for better customer which led to the 'Gethuman' initiative, is forcing enterprises to rethink and change their strategies. Customers frustrated with poorly designed interactive voice response (IVR) systems and long hold times have become more reactionary and verbal. They are sharing their views through online forums which are creating a buzz around poor customer service. Enterprises previously focused on creating more efficient contact centers used IVR to deflect calls and reduce agent costs. They used metrics such as call handling time and number of calls answered to determine how well contact centers were performing. However this strategy was unsuccessful in building lasting customer relationships as agents were more focused on reducing call time than providing accurate and informative answers to customers. The focus is now on customer retention because, with the slow growing economy, budgets are tight and business growth is stagnant. In order to retain customers, enterprises need to focus on providing better customer services by integrating CRM solutions as a basis of customer-agent-interactions. Those need to be more closely monitored to ensure that customers are receiving the right support and their reasons for calling need to be better understood.

MARKET TRENDS AND THE EVOLVING CONTACT CENTER

In industries such as financial services and communications, products have become commoditized and customer service needs to be used as a differentiator. Enterprises can utilize analytics to find out more about their customers and their value to the business. CRM applications can also be used to help agents in providing the right information to customers and are therefore becoming more valuable and more widely adopted. Agents' roles and responsibilities must change to adapt to increasing use of phone and web self-service. There has been an increased use of inbound and outbound IVR to automate basic contact center interactions, which has changed the types of communication between agents and customers. Agents are expected to provide more knowledge

than what can be found on the web or through the IVR application and often have to deal with customers' complaints or complex queries. In Datamonitor's most recent Business Trends survey, Contact Center Investments in Developed Markets (DPTC0049), 150 contact center managers and IT decision-makers were asked about their adoption of contact center technologies and plans for investment. The survey indicated that self-service solutions are gaining in importance with 45 percent of respondents currently using either a DTMF or speech-enabled IVR solution. These applications are also becoming more sophisticated which has affected the nature of calls to agents. Speech-enabled IVR systems can handle more complex interactions and increasingly, calls are routed to agents only when a customer requires more detailed information or when the transaction is highly complex. Customers also have access to more information about products and competitors through online communities and websites. Agents are therefore often called upon as a last resort and need to provide in-depth knowledge and solutions. The fact that customers can now influence each other via shared resources and online networking communities is also a threat to business as they often report on their bad customer service experiences through multiple forums including the web, email and word of mouth. Both IVR and the web must be accounted for within agent desktop solutions and, as a result, multichannel offerings are emerging. Customers do not want to repeat information they have given to an IVR system or that they have provided via an instant messaging (IM) session with a customer service representative. Vendors are therefore integrating mobile, web, IVR and IM into their agent desktop solutions. There is an increase in the numbers of home-based and outsourced agents. In order to utilize the contact center to its full potential and provide the best service, enterprises need to invest in skilled agents. This is often a challenge for contact centers and high agent turnover is costly in training and recruitment time. Therefore, the number of home-based and outsourced agents has increased. Datamonitor's Global Contact Center Outsourcing Model (IMTC0095) shows that there is an estimated 1.3 million outsourced agent positions globally in 2008 which is almost 16 percent of all APs. In

addition, as Figure 1 shows, 31 percent of enterprises are already using home-based agents and an additional 34 percent are likely to invest in this model in the next 12-24 months. These 'virtual' agents need to be closely linked to other agents and also their back-office colleagues in order to be up to date on business information. Unified desktop solutions can help to provide information faster and using a browser-based or remote software approach is also favorable for faster deployment and more manageable IT architecture. A hosted CRM solution is particularly suitable in this scenario, as distributed agents are difficult to manage from an IT and training perspective. A hosted solution reduces

the need for IT staff to monitor agents in different locations.

DRIVERS FOR INVESTMENT IN CRM AND UNIFIED AGENT DESKTOPS

The need to reduce costs and improve customer retention is driving investment in CRM: The credit crisis is forcing enterprises to change their contact center strategies. Enterprises want a better understanding of how their customers and agents are behaving to improve service and thereby retention rates. The fact that so much information is available on the web through online communities and ratings websites makes customers more susceptible to the influence of oth-

ers' opinions. Agents need to have access to a greater depth of information in order to help enterprises provide differentiating customer service. Enterprises are investing in unified agent desktops and advanced CRM applications so that agents are better equipped to provide faster service and more targeted offers using historical data. Modern CRM solutions are the basis for efficient desktop agent work and should be part of an efficient BPO process management between enterprises, their call center service providers and the customers they are dealing with.

Source: www.jacada.com

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STATEMENT



Guuy Tweedale,
European General Manager, Jacada, London

"Ever since their first appearance in the 1990s, CRM systems have promised much and delivered less."

CRM solutions have become crucial for the professional customer care management of call center providers. What are the advantages in combination with Unified agent desktop integration? Call Center International spoke with Guuy Tweedale, European General Manager with Jacada, London.

CCI: Mr Tweedale, what are the main advantages of a CRM integration into the Unified agent desktop, from your point of view?

Tweedale: Ever since their first appearance in the 1990s, CRM systems have promised much and delivered less. Even for those organisations that beat the odds and had a successful implementation, the call centres' perspective was that CRM just created another application that the agents had to navigate around and enter data. CRM is especially a problem with the embedded processes developed with the needs of the marketing and sales departments in mind rather than the agent's or customer's. And is it really a 360 degree view of the customer that is needed in a call centre to keep customers happy? Whilst it is important to have information about the customer, an agent needs to immediately access all the information about that customer that is relevant to the call. To achieve this, it is necessary to implement a unified agent desktop. It provides a single point of access to all the mission-critical applications and tools required by the agent for effective customer interactions. More importantly, it provides an integrated, automated, contextual view of customer data and customer service processes. It automates workflows to align agent tasks with the intent of the customer, and streamlines the interac-

tion to deliver a more efficient and effective customer experience. An intelligent desktop can improve almost any metric associated with efficiency and effectiveness – from handling times, training costs, call resolution, and revenue per call to ultimately improving the customer experience. Bottom line – it helps to reduce cost, increase customer satisfaction and drive revenue growth.

CCI: Which kind of agent skills and customer services does CRM integration actively support when it comes to BPO Outsourcing of call center activities, from your experience?

Tweedale: Increasingly outsourcers are having to fulfil contractual obligations around customer satisfaction, as well as the traditional cost containment, particularly when they are dealing with large-scale, long-term client contracts. This creates a need for complex integration of the clients' applications – including CRM systems – the call centre's applications like CTI and generic business tools like email. This brings increased complexity to their agents' desktops with longer handling times, a lower first call resolution and increased cost per call. By making the systems simple to use through the integration of the disparate applications into a unified desktop – where an agent sees exactly what they need to see, at the right time for that specific call – outsourcers are able to improve efficiency, reduce training time, reduce staff turnover and improve morale as well as more easily employ part time agents to cover peak call periods.

CCI: What will be the future challenges of CRM and call center integration, with view to global customer interaction support of call centers?

Tweedale: CRM applications will always present a challenge for the call center – wherever they are in the world. CRM is a business process tool primarily designed for marketing and sales. At the same time, the call centre agents will always need access to the data and processes stored in the CRM system, so it is critical that the CRM tool is part of the integrated agent desktop. A unified desktop is the only solution that will allow the CRM system to meet the needs of the agents, as it allows CRM processes and data to be optimised by call type. This is the most effective and efficient way to allow agents to access the data and quickly satisfy customer queries.

Interview: Eva-Susanne Krah

