



WHITE PAPER

*Vertical Industry:
CC Outsourcing*

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1 The Contact Centre Outsourcing Industry

The main selling point of a Contact Centre outsourcer is that they manage customer services from end-to-end at a competitive price, being able to satisfy an agreed SLA that covers a wide range of KPI metrics, quality and customer satisfaction.

Companies expect to benefit from the Outsourcer's **extensive knowledge within the Contact Centre** to improve their customer relationship processes, resulting in a Contact Centre that is more dynamic and adaptable to changes that might occur driven by market evolution, marketing strategies, client needs, etc.

So a **Contact Centre outsourcer is much more than just a sweat shop** that helps companies take people off their payroll. The Outsourcer's value proposition is much more of a consulting organization with the aim to improve the Contact Centre operations of any Company. Their clients can then focus on their core business, and the Contact Centre Outsourcers focus on what they do best, which is improving processes, managing people and training them to provide the most qualified customer interactions on the client's behalf.

A Contact Centre Outsourcer must have a wide expertise in multiple areas. Hiring, training and managing personnel are extremely important but there is also a wide range of technological elements that are vital to successfully handle the outsourced services.

Once the processes and personnel are optimized and under control, **the only way of increasing the levels of productivity, quality and service, is by implementing technological solutions** that embed the business rules, automate transactions and tasks, merge business information and service work flow, prioritize and blend interactions based on the SLA or rules demanded, increase overall performance of the service and the agents, provide an extensive quality control mechanism, provide a full 360 view over the contact centre operations, collect and offer information which allows you to identify the problems and plan corrective actions, etc.

Managing Contact Centres efficiently is not an easy task, and being successful in this area requires experience and constant improvements on quality and cost. Companies that externalize their Contact Centre operations normally use the following criteria to choose the best outsourcer for their operations:

- Being able to commit to service requirements (technical and operational)
- Cost of the service
- Trust
- Experience in the customer's specific industry

Although the trust factor is difficult to analyze and sometimes it might be a very subjective valuation, it must be taken into consideration, because the company leaves their customers being their most valuable

asset in the outsourcer's hands. This trust can be built up using several tools like referrals from the market, professionalism shown in the meetings with the potential customer, representative and well organized installations and last but not least cutting edge technology applied in the Contact Centre which represents a key differentiator to improve the client's customer service.

2 Industry Challenges

2.1 Salaries and Personnel

The main cost in any Contact Centre is personnel. Approximately 60-70% of the Contact Centre costs are salaries. It is therefore obvious that **any action which will increase the agent productivity will have a direct impact on the overall cost of the service**, translated into higher benefits and/or more competitive pricing for the service.

Increasing productivity not only potentially requires less agents to handle a given service, it also results in lower direct and indirect costs related to:

- Supervisors
- Training personnel
- Quality personnel
- HR and administrative personnel
- Reduction in non-IT infrastructure (desks, chairs, building, electricity, etc.)
- Reduction in IT infrastructure (PCs, phones, headsets, cabling, switches, etc.)
- IT support (less equipment installed)

2.2 Human Error

Human error is an important challenge the Contact Centres must deal with. Collecting incomplete or wrong information, dialing a wrong number, forgetting a step in the process flow, providing wrong or inconsistent information to a client, etc. creates an increased workload to fix these errors (if detected on-time) and ultimately unsatisfied customers.

Some of these errors can be reduced with extensive training, coaching and quality control but might not be cost effective and won't always guarantee that they won't happen again.

Outsourcers must ensure that these human errors are minimized or eliminated because their reputation and performance depends on it. Automation, application driven workflow, and real-time collected data validation are the answer, although it may be complex and time consuming if the organization does not have the right tools.

2.3 Training and Quality Management

In any Contact Centre the personnel assigned to handle customer interactions must be trained in many different areas, such as:

- How to manage the client interaction properly (telephony techniques)

- Which policies and processes to follow with each request
- Knowledge of the company they represent
- Understanding of the products and/or services they offer
- Use of the existing IT infrastructure and different applications to capture information or handle the customer requests

Some of these topics require periodic refreshment training due to the constant evolution of the market, processes, products and/or the company's marketing/sales strategy.

For a BPO company that provides services for a large number of companies and employ a large number of agents this becomes an important task and requires the corresponding training personnel and training infrastructure (rooms, workstations, IT, etc.). **During training, agents will be taken off the campaign they are working on and will not be productive**, so any reduction in the necessary training time and/or increase in the quality of the training may represent an important cost saving potential.

One of the most important areas to address is to **reduce the number of IT applications** used by the agents, make them easy to configure and use and if possible automate the agent's activities.

Applications like CTI combined with Intelligent Routing can also help to reduce agent training through specialization. Instead of training all agents on the complete number of services provided, specialized groups can be organized and customer interactions can be routed to the different specialists according to the customer's profile and requested service.

Quality Management is vital in this process, so the Outsourcer must have the right tools in place to identify if agents are communicating correctly with the client, have the necessary knowledge to interact with the client, follow the required processes and if they are using the appropriate tools correctly.

These tools must be able to identify issues at a macro (campaign or service) and micro level (agent), and detect if there is a generic problem across all agents or if it is just limited to a single or few agents, then allowing them to take the appropriate actions where necessary.

Outsourcers should not only implement quality management tools and policies to guarantee customer satisfaction but also use tools to identify issues that directly affect SLAs or the time needed by the agents to manage certain customer's inquiries which directly affects the profitability of the service and the contractual obligations with their clients.

2.4 Commit to Client Requirements, Adaptability, Flexibility and Infrastructure simplification.

Outsourcers must be extremely flexible and be able to adapt to existing or new (often very heterogeneous) requirements of their customers (interaction channels, IVR, automatic dialing solutions, recording of calls, etc.)

Corporations might change their marketing strategies very fast and the BPO not fulfilling all their needs on time, might result in a loss of part of or the complete contract.

For this reason it is **extremely important for Outsourcers to have modular solutions in place** which can be implemented quickly, are easy to set up and can adapt to many different clients which require no or very little integration for every new request.

Isolated point solutions from the same or different vendors are not generally an appropriate solution due to the difficulties of integration, reduced flexibility and high number of required specialized resources.

2.5 Integration with Third Party Client applications and Application Independence

Clients may have their own business applications and want them to be integrated with the different Call Centre applications provided by the Outsourcer (outbound and inbound calls, Intelligent Routing, IVR, email, fax, chat, etc.). These solutions must have interfaces (SDK or API) to allow this integration. **Using many different systems limits integration or adds complexity** because each system will have a different interface or not a compatible interface resulting in a bigger effort in time, professional services and know-how.

In other cases the Outsourcer's client may have no business application at all, but they request the collection of data, requiring the ad-hoc development of customer made applications and constant modifications based on the changing client's needs. In many cases these applications need to be developed in extremely short timeframes.

A unified suite requires only one interface (SDK or API) to integrate all the different modules with the client's applications. If the suite also includes a powerful scripting tool which does not require any software development skills, then the Outsourcer will be able to create rich applications in a limited timeframe (days or weeks, instead of weeks or months) providing many additional advantages like full integration, automation of business processes, attached business data to interactions (type of interaction, client, service, etc.) already controlled by the suite.

An easy to implement and powerful scripting tool radically shortens agents training times and embeds business processes. The Outsourcer will often use this tool even if it is not requested by the client because it provides extraordinary benefits not only on the agent performance side but also on the operations and quality management side. Performance analysis is not just limited to call duration and similar metrics but can be extended to sophisticated reporting on business data that provides qualified feedback to their customers and can help to add real value to their client's business.

2.6 Back Office

In some cases the client requires the Outsourcer to follow **specific processes that also include Back Office** tasks, like completing a transaction request from a customer, etc. In most of these cases the Back Office tasks are managed manually, requiring an important number of people allocated to these tasks and an important effort to comply with the established SLAs.

Any tool which allows blending of different inbound and/or outbound interactions (through any channel) with Back Office tasks drastically reduces the required personnel. It also allows maximizing of the agent's productivity being able to assign these tasks automatically to the best available agent during off-peak hours.

2.7 Operation Management and Control

Operation Management and Control is vital for any Contact Centre and even more important for the BPO industry due to their extremely dynamic environment and services.

Simplifying these tasks is very important in order to detect issues and implement the necessary corrective actions.

The implementation of many isolated systems makes this task difficult or even impossible. Many data repositories will present the data in different formats and will require using several tools to exploit the information requiring the corresponding training.

A complete suite which handles all the Contact Centre interactions, stores this information in one single place (repository) and the information is accessible through one single tool will simplify the whole process. The data is consolidated and consistent through all the modules, so operation and quality management teams can easily detect any unexpected deviation from the targets and implement the corrective actions immediately when necessary.

If the Contact Centre solution can also integrate the client's business rules, logic and data, it will be able to provide a much wider analysis, enabling the identification of issues which cannot be detected by just identifying the number of interactions handled per hour or average handling time. This will not be possible with wrong, time consuming or too complex processes.

On the other hand, the Outsourcers are not the only users of the data or information populated by the systems. In this industry, clients frequently request delivery of extensive reports which most of the times must be personalized based on their needs. The tools must be able to design and generate automatically the required reports, so operation and quality teams are focused on analyzing the information and identifying new strategies to improve the services instead of being occupied with the time consuming administrative tasks of manually "painting" or copying the information provided by the systems to spreadsheets to provide the information the client is requesting (reports each day, each week, each month, etc). Also, this "manual" manipulation of the data might result in human errors.

These key resources must be focused on providing the highest value for the Outsourcer and their clients, which is to improve the operation and not manually creating the reports requested by the clients.

The best solution for Outsourcers will therefore be a tool which not only manages the interactions but also is able to collect and take into consideration the business data, rules and processes, providing real time monitors, historical reports as well as being able to design custom reports which don't require the Outsourcer to constantly involve personnel to create them (define them once – run many).

2.8 Client Business Processes, Rules, Logic and Intelligence

All organizations are different, so each company defines their own processes, rules and logic to handle their customers' interactions. **As an Outsourcer these different ways of doing things must be adopted by the services operated on behalf of these Organizations.** If contact centre applications are used to implement these processes, and automate them as routines, the Outsourcer does not need to rely on people but uses automated systems to enforce the client's requirements with 100 % accuracy.

Standard processes like recognizing a customer's value for the organization based on their segmentation, adding business data to the interaction and route it to the best available agent can only be implemented with intelligent routing tools.

Contact Centre Outsourcers require systems that are flexible and intelligent enough to embed the different client's processes, rules and logic. In a multichannel environment this intelligence must be extended to all the channels.

3 Presence Technology Benefits applied to this Industry

Presence Technology provides a complete, scalable and modular suite which responds to all the challenges Outsourcers face as described above. The Presence Suite is totally modular, so the Outsourcer can purchase only those modules required to satisfy their initial needs, being able to extend modules and features in the future as required, reusing the modules and licenses already purchased as well as maximizing and protecting the investment already made.

The suite has an extensive number of modules which add specific features to the product. All the modules are pre-integrated, so they do not require any integration effort to make them work orchestrated with other modules already purchased. All modules interact through the same core, sharing the events and information used and managed by the solution, storing all the data and information in a consolidated and normalized data base.

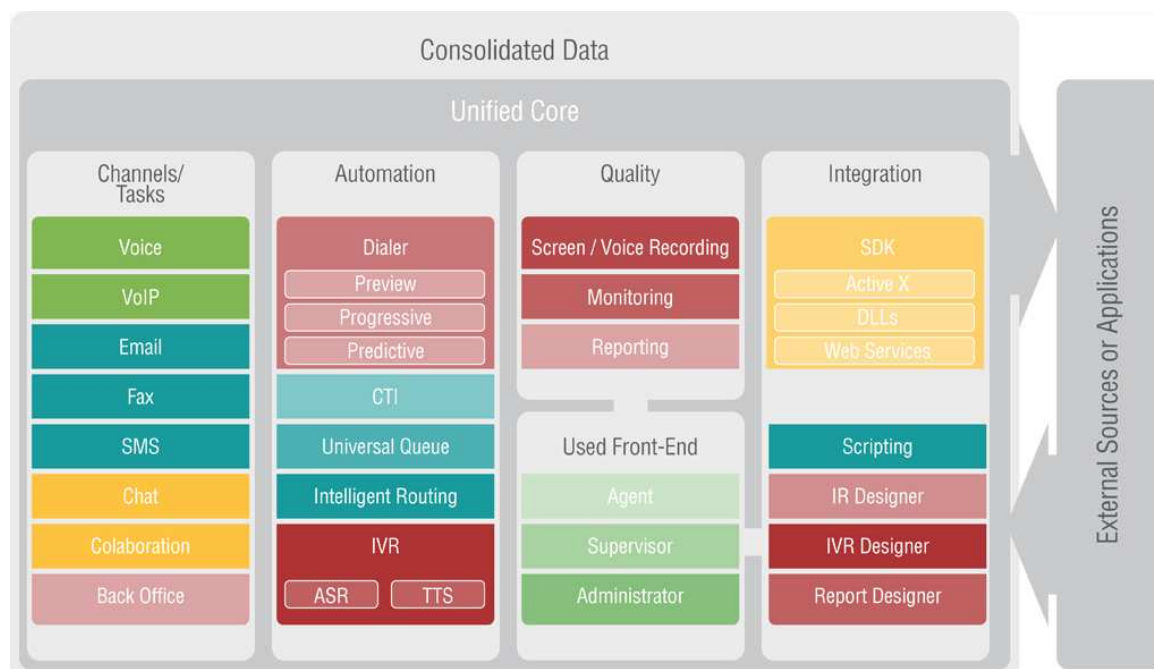
One of the major benefits of the Presence Suite is the ease of use and adaptability to dynamic changes. This is possible due to the tight integration between the modules as well as the interface between them and the three main front ends specifically designed for the main roles in any contact centre:

- **Presence Administrator:** used to administer the platform and mainly designed for IT personnel who manage the Contact Centre.
- **Presence Supervisor:** designed for the personnel assigned to different operations or areas (supervisor, quality control, workforce teams, etc), which allows managing the services, populating the monitors and reporting, and embedding the service business rules.
- **Presence Agent:** is an extremely easy to use agent front end with a little footprint on the screen so if the agents need to use other applications to handle the interactions (for example a CRM system), they need not toggle back and forth between screens.

These front ends integrate automatically with any new module which is activated, adding more menus and options, but the interface has the same logic, look and feel, drastically simplifying the training.

All modules share the same information and do not require the user to perform multiple configurations necessary with isolated systems, e.g. configuring agent logins in several interfaces. This capability not only reduces the administration effort, it also reduces or eliminates the human error.

The Presence Suite architecture described above can be summarized on the following diagram:



Presence Suite Architecture

3.1 Presence Suite Modules

The modules which compose the Presence Suite are as follows:

Dialer / multi-channel / multitask and blending:



Presence Voice Outbound: powerful and robust dialer that offers three different automated dialing modes: preview, progressive and predictive. It produces remarkable improvements in contact centre productivity. It also includes all the functionalities of Presence Voice Inbound.



Presence Voice Inbound: a complete solution for managing the flow of inbound calls, capable of combining any contact centre interaction. Just like any other module from the Presence Suite, it can be integrated with any business application using the Presence SDK.



Presence Messaging: adds support for the handling of e-mail, fax and SMS channels to the Presence Suite. These channels are managed by the universal queue which operates according to the business rules, priorities and skills of the agents selected in the system to handle the interactions.



Presence Internet: adds support for the management of Chat, Web Callback and Web Collaboration channels to the Presence Suite. These channels are managed by the universal queue which operates according to the business rules, priorities and skills of the agents selected in the system to handle the interactions.



Presence BackOffice: integrates the BackOffice tasks generated in the contact centre into a single interaction management queue. This module gives control over these tasks, even if they are not related to interactions previously managed by the Presence Suite.

Multi-channel Routing Intelligence and Self Service:



Presence IR: an engine that automatically performs routing actions based on the business rules set up in the interaction management processes or flows. The engine can process any kind of interaction regardless of the channel (calls, e-mail, etc.), executing the routing rule and assigning the interaction to the agent most qualified to handle it.



Presence IVR: adds sophisticated self-service voice portal functionalities to the Presence Suite, integrating TTS and ASR engines. This allows intelligent strategies to be created, along with fully automated interactive services for the contact centre.

Quality and Recording



Presence Recording: is a system for recording the agent's conversations and desktop screen. Recording can be activated in accordance with a preset recording plan (by service, extension or login) or on demand. Voice recording and screen captures are completely synchronized. This is an extremely useful tool for quality management or to generate proof of a transaction.

Fast application / scripting creation and integration with third party applications



Presence Scripting: this enables scripts to be designed and published so that they can be used in contact centre services, using a very simple tool with an entirely graphical interface that requires no programming knowledge. Fully integrated with the Presence Suite, the scripts present and collect the information necessary in each situation to manage the customer or service.



Presence SDK: is a development kit that can be used to integrate any other business software tool used in the contact centre with the Presence Suite.

Tailor made reporting and data analysis:



Presence Custom Reports: is a powerful and flexible report designer that can be used to create completely customized reports combining data from the Presence Suite and databases from other systems (e.g., ERPs, CRMs, Ticketing, etc.). It has a wide range of connectors with other databases. Reports can be exported in various formats, including PDF, Word, CSV, Excel, etc.

Front-ends:



Presence Administrator: a management tool that enables the system administrator to configure the more technical parameters of the Presence Suite, as well as to grant different levels of access and assign profiles for the various system users.



Presence Supervisor: an online management tool designed specifically for service managers which makes business rules quick and easy to implement in the Presence Suite. From this tool, all Presence Suite modules can be managed. It is operated entirely through a highly intuitive and easy-to-use GUI. The tool incorporates a wide range of real-time and historical reports providing total management control over the contact centre.



Presence Agent: is a front end in toolbar format that the agent uses to interact with the system. The module can be installed on the agent's workstation or run entirely through an online interface. The Presence Suite includes an automatic software update service to update front end interfaces when required.

TDM and VoIP Gateway:



Presence OpenGate: Although the Presence Suite integrates natively with Avaya CM through AES (TSAPI), the Presence Suite also integrates natively with a powerful and flexible TDM and VoIP gateway developed by Presence Technology. This gateway is based on the robust and flexible Asterisk switching engine, but optimized by Presence Technology to meet the highest standards of performance, scalability and availability established in the most demanding contact centres. It enables the Presence Suite to be deployed without the need of a telephone switch, interconnecting it with any PBX on the market.

3.2 Presence Suite and the C.C. Outsourcing Challenges

The Presence Suite can play a significant role in overcoming the challenges Contact Centre Outsourcers experience as part of their core business.

3.3 Cost Reduction and Productivity Improvement

The **Presence Suite shows an impressive ROI, which in some cases, has been less than a month.** The vast number of features provided by the product like dialing (preview, progressive, predictive), multichannel/back office support, full channel and Back Office blending, IR and IVR which routes interactions intelligently or even completely automates interactions, Scripting which minimizes the applications to be used by the agent, etc. provide an astonishing productivity improvement which in some cases have reached an increase of revenue of up to 461 %.

Although cost reduction might be the main goal of any Contact Centre Outsourcer, many other goals are also achieved by the Presence Suite with the same efficiency.

3.4 Human Error Avoidance

The **Presence Suite is able to drive the agent** through the whole interaction process, presenting, capturing and validating the information required by each service and following the business logic flow based on the selections, steps or information introduced by the agent.

The **Presence Suite is also able to automate many tasks**, taking this responsibility away from the agents and therefore helping to avoid human errors. Some of these tasks can be for example dialling the customers phone numbers using preview, progressive or predictive algorithms, prioritizing the

channel/task/interaction that a specific agent needs to handle, route and prioritize a customer interaction based on the SLA and business rules, manage efficiently call back scheduling, etc.

These features help to **focus the agents on managing the customer interactions** with no need to worry about following the right processes, steps and dealing with the correct information.

3.5 Simplified Training and Quality Improvement - a Reality!

To ensure agents are trained on the tools, processes, products and customer service techniques it is vital to commit to the highest possible performance, follow the defined quality standards and guarantee the highest customer satisfaction.

The Presence Suite improves Training and Quality tasks through:

- **Reducing the number of tools** used by agents and Management (Operation, Quality, Management, IT, etc.).
- **Standardizing the set of frond-ends** (Administrator, Supervisor, and Agent) to be used **by all the services** handled by the Outsourcer.
- **Providing a full feature Scripting** (Presence Scripting) which drives the agent on any interaction, presenting, capturing and validating any business information needed to operate the service.
- **Embedding Business Rules** and Logic and taking them into consideration when routing the interaction automatically to the specialized agent, allowing for segmentation of the training of the team and being able to specialize the agents based on customer type, subject, task or channel.
- **Automating** part of or complete **interactions** not requiring human intervention, so agents do not need to be trained on those tasks.
- **Collecting consolidated operations and business information**, independent of the module or modules implemented, offering a drill down analysis which allows identifying issues, gaps and improvements fast and easy.
- Providing **Phone and Screen Recording** on-demand or based on a recording plan, which allows identifying of any issue on managing customers techniques, product, service, or applications usage.

3.6 Committing to all Client Demands

The **Presence Suite is extremely feature rich**. These features have been grouped together in different modules so the Outsourcer only has to acquire the modules based on the evolution of needs of existing or new clients.

All modules are pre-integrated, **considerably reducing the time to production**. In some cases it is not even necessary to acquire new hardware, minimizing further the complexity and the investment.

The product has been specifically designed to commit to the directive of delivering a contact centre solution which is easy to implement, use and maintain.

3.7 No more IT Struggling

Management of traditional Contact Centre IT is complex due to the diversity of systems a Contact Centre might end up with and to accommodate the different features requested by their customers.

Having multiple systems requires more space, higher electrical consumption / UPS / Power Generator, a bigger network infrastructure and additional air conditioning in the Data Centres. This results in a higher cost. The other problem apart from the cost is that each isolated system is an “individual” entity, so each of them have their own set of tools for it’s administration and management, their own integration and interconnection requirements, their own APIs/SDKs to integrate with other systems or third party applications, their own set of reports and data sources to store the information, etc. In most cases each system needs to be administered and configured separately, so the administration effort has to be duplicated, tripled or quadrupled (e.g. set up agent logins, access rights, reporting, etc. for each of the systems).

This system/solution isolation ends up with a constant effort from the IT department to ensure each piece is working as expected, and when an issue arises, they need to analyze which system (or systems) is causing the issue and solve it. Sometimes when the problem is reported to the different vendors, this might end up with a constant finger pointing between them and requiring much time and effort from the IT department to align them and get the incident solved.

The diversity of systems and solutions also require an IT expert for each of them and you may end up with a big number of IT personnel with an incomplete overview of the infrastructure in place, because it is just too complex to understand.

Also, when the systems need to be adapted to address the needs requested for specific campaigns, major modifications or adaptations may need to be made, sometimes requiring the development of ad-hoc applications to overcome existing limitations, making it almost impossible to have all of them to work in an orchestrated way.

The Presence Suite, on the other hand, does not experience any of these disadvantages. All modules are tightly integrated and orchestrated through a common core. Administration, Supervision and Agent front ends are the same, independent of the modules implemented, and what is more important, all the information flow between the modules is shared through a common core and all information is stored in a consolidated repository, simplifying monitoring, reporting and administration. The personnel that interact with the Presence Suite only have to be trained on one solution, and if any issue arises, the vendor takes immediate ownership and action to resolve the incident.

The **Presence Suite** also provides **important integration advantages over their competitors**. If the Contact Centre Outsourcer is demanded to integrate the solution with a third party application owned by the client, IT only needs to use one SDK (instead of many) to interact with all the modules, simplifying and reducing the time and effort required for the implementation.

The **Presence Suite** also provides an **extremely valuable module for Outsourcers: the Presence Scripting tool**. This module allows the Outsourcer to “develop” any Contact Centre application without the burden or complexity of using a programming language to develop a fully integrated CTI Script or Application. The Scripting module is so visual, intuitive and easy-to-use that many Contact Centres will not even use their IT departments to develop these scripts, freeing up IT personnel to be focused on IT oriented elements like the network, database administration, workstation support, etc.

3.8 Back Office as Profit-Making Opportunity

Back Office tasks are vital for many organizations but are often forgotten by Outsourcers. Many clients that outsource their Contact Centre operations often need to outsource back-office tasks related to customer enquiries or processes, and in many cases they would like the Contact Centre Outsourcer to also manage the back-office for them.

The Contact Centre Outsourcer normally has them handled by an exclusively dedicated group of people, using separate control tools like Excel spreadsheets or specific applications developed to keep track of the status of tasks, resulting in additional complexity or inefficiencies.

Presence has recognized these back-office tasks as being very important and as part of an end-to-end customer relationship. By extending the same algorithms used for any other channel, such as universal queuing and blending, allows agents to now handle back-office activities. It also allows the use of Presence Scripting to drive the agent handling these tasks.

Why dedicate more personnel to handle back-office tasks when **you can use call centre agents during off-peak hours**? With Presence the Outsourcer can control priorities, blend back-office tasks with other channels and retrieve all the necessary statistics to control and improve processes for the back-office.

3.9 Focused on Added Value Management

Operation and Quality management should be focused on identifying gaps and analyzing the information collected by the different systems in place to handle customer interactions, taking the corresponding actions as necessary. This can be an **extremely difficult task if all the information is retrieved from many different data sources from different systems** used in the contact centre. Most of these systems will have different architectures and purposes and will measure the same or similar events in different ways and also measure completely different events dependent on the application.

Matching this data and converting it into meaningful information would be a nightmare for most Outsourcers.

This complexity can be solved by developing specific applications which are able to match all this data, but in many cases this cannot be achieved because it requires too much development effort to cover all the needs. So Operational and Quality personnel end up with huge Excel spreadsheets in which they copy and paste manually data from every system before they can start analyzing the information.

The major problems with using these manual techniques are:

- If spreadsheets are used, you are already **behind schedule**. You will never have the latest information, so you cannot take immediate action to correct deviations from objectives.
- Many errors can be made copying and pasting data, so you might be analyzing incorrect information and **making wrong conclusions**.

This situation with Contact Centre Outsourcers can be even worse when their clients request daily, weekly and monthly reports following specific formulas and formats. In this case many reports must be created manually, wasting much of the supervisor's and Service Delivery Manager's time in "painting" reports instead of managing and motivating their team, analyzing the information and improving the service operation.

The Presence Suite resolves all these issues. The product already takes the action of normalizing all the business and customer interaction information in a unified repository and this process is fully automated. The Operation and Quality teams need only use the extensive list of monitors and reports already built in the product and can concentrate on where they add real value to the business: analyzing the situation and defining the corrective actions or new strategies which will allow them to improve the service.

The Presence Suite also provides a module for tailor-made reports for internal use or to deliver specific reports demanded by their clients. The Presence Custom Report module allows designing of any report, binding the information stored in the Presence Suite repository. This module also allows the user to merge data with any other data source used by any other application, for example: CRM, ERP or a ticketing system. The report only has to be designed once, with the desired calculations, look and feel and afterwards can be executed based on the selected parameters whenever needed.

With Presence, Operation and Quality teams are focused on providing added value to the organization, improving the service operation and managing their teams based on facts, instead of painting reports.

3.10 The Intelligent Contact Centre

Most of the solutions implemented in Contact Centres provide routing of a customer interaction to an agent considering only workload and static rules (e.g. calls received on a DID must be routed to a specific

group of agents, emails received in a mailbox must be routed to a specific group). They do not take into account the customer's value for the organization, the reason why he/she contacts the Call Centre or other information which can affect the routing decision.

With this limited routing, the customer interaction often has to be transferred to another agent or specialized group if it cannot be resolved by the first agent. Embedding business information and rules as well as customer information and the customer inquiry in the automated routing process provides many advantages like fulfilling dynamic SLAs based on this information, fully automate the interaction or automatically route to the specialized group of agents avoiding constant transfers between the teams.

The Presence Suite provides these benefits through the Intelligence Routing module which can be extended by the IVR module if additional information needs to be collected from the customer or partial or complete automation of the interaction is requested (using ASR and TTS technology).

A few examples for typical routing functionalities provided by Presence are:

- Identifying the customer and prioritizing of the interaction based on customer data or segment
- Identifying the reason for the call asking the customer simple questions
- Base the routing decision on products or services purchased previously
- Route emails based on email address, subject and body field contents
- Consider historical customer interactions to make the best routing decision:
 - Route to a preferred or personal agent
 - Route to the last agent who handled their previous interaction
 - If the customer is calling to get feedback about an issue the client reported previously, automate the interaction and provide feedback through a message (recorded or TTS)
 - If an issue has been detected on their home location, being able to give them automatic feedback if calling for that specific issue.
- And many more

Presence Intelligent Routing and IVR modules can make dynamic routing decisions and fully automate interactions of multiple channels like: Voice, email, Fax and SMS.

Presence Intelligent Routing and IVR can also provide more information to the agent attaching customer and business data to the interaction and display it through the Presence Agent Application (pop-up) or automatically fill in and populate information in a Presence Script or third party application, **reducing the time agents need to identify the customer**, search him/her in the business application and introduce some data collected by Presence Intelligent Routing or IVR.

All this information together with data that has been captured by the agent can be attached to the interaction if transferred between agents, so the agent that receives the transferred interaction does not

need to ask the customer again for all this information and instead will be able to focus on resolving the enquiry.

The information related to the business and the customer is also stored in the Presence database repository, providing Operations, Quality and Strategy Teams with very valuable information which will **help them to improve the service**. For a Contact Centre Outsourcer this information and its analysis constitute a key differentiator in the market. Not only will it help the Outsourcer to improve and manage exquisitely the Contact Centre service on behalf of their clients, but they will also be able to provide **value added information back to their clients**, helping them to improve their core business processes, becoming a Strategic Partner for their clients and a BPO expert.

4 About Presence Technology

Presence Technology is a software company with a high value-add technology proposition for Contact Centres.

Our dedication to serving the client has led us to develop solutions that adapt to the specific needs of each user. Our focus is on solving the special challenges of each case. The Presence Suite affords great flexibility to the Contact Centre's dynamics, and contributes directly to improved productivity margins for services, providing a return on investment unequalled in this sector.

The Presence Suite is currently the most comprehensive collection of Contact Centre tools in the market, and has been developed to improve Contact Centre management while achieving the highest levels of quality and customer satisfaction.

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