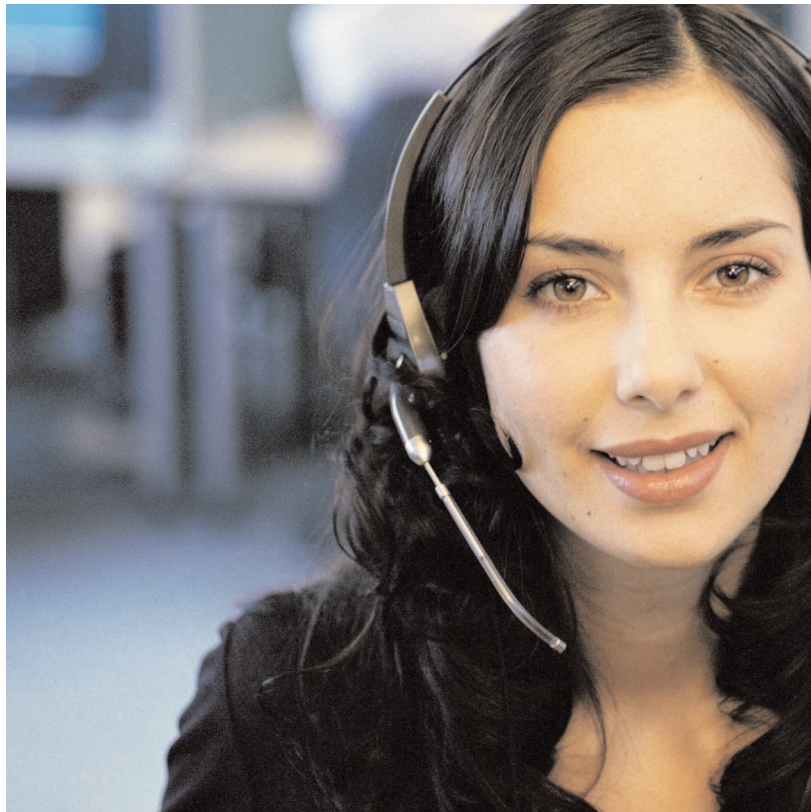


# Grow Your Business

The Value of Knowledge in the Contact Center

## WHITE PAPER

Cincom In-depth Analysis and Review



SIMPLIFICATION THROUGH INNOVATION™

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The Value of Knowledge  
in the Contact Center

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## The Role of the Contact Center

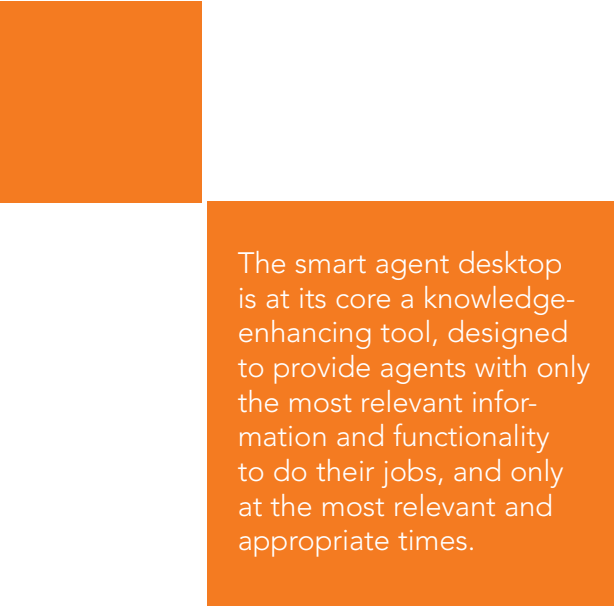
Contact centers are the information clearinghouse of 21st-century business. What the website does not broadcast, the contact center must know. What Sales has inked or Marketing has promised, the contact center must reinforce. What manufacturing has shipped or procurement has ordered, the contact center must acknowledge. Yet the talented men and women who await phone calls, e-mails, faxes and chat sessions are often hampered in their ability to be the great enterprise oracles they are so desperately needed to be, simply because their access to information is constrained by an unwieldy crowd of tools and applications that are not designed to work in aid of one another. They are instead a tiny window into a particular pocket of information – and that unsightly collection of windows quickly becomes an impediment to skillful, coordinated activity in the contact center.

Even routine customer-service interactions may require agents to interact with five, 10 or even 15 or more systems. Between pre-call setup, on-hook data retrieval and entry, and post-call wrap-up, an agent can spend more time getting to the correct information than the time required for he or she to actually perform the work. Much of the time, these systems are ignorant of one another, requiring agents to log on each time they access a new system. This requires customer look-up data to be re-keyed with each new program, offering its own unique interface that must be learned and mastered over time. Agents spend much of their time bouncing around applications, resulting in customers sitting idle, or being forced to repeat their account numbers over and over again as new back-end systems are opened.

In the contact center, time is money surely as it is in Sales or Manufacturing. In most organizations, labor is the biggest variable cost in the service equation. Therefore, time and how your agents spend it represents the single most important lever to your service organization's fortunes. Yet agents are asked to spend much of their on-hook time juggling entirely too many applications and point solutions that only provide them with a sliver of the information necessary to do their jobs.

This balancing act is a drain on agent productivity, IT resources and – worst of all – customer patience. Put simply, customers and agents alike know that their interactions shouldn't demand constant repetition and long wait times while agents marshal their resources.

There is an alternative. Smart, integrated desktops can take the power behind each and every point solution and carefully tailored application that powers a modern business, and place it all behind a single, coordinated interface. These unified desktops are designed to maximize agent productivity and minimize the administrative downtime created by knowledge application overload. The smart agent desktop is at its core a knowledge-enhancing tool, designed to provide agents with only the most relevant information and functionality to do their jobs, and only at the most relevant and appropriate times.



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## Developing the Smart Agent Desktop

Many contact center organizations do not have a readily identifiable agent desktop, or, it may be more accurate to say that the agent desktop is characterized by whatever program the agent has to access at any given moment. Even organizations with fairly straightforward business models have faced a significant explosion in contact channel complexity over the past 10 years, and as a result, some companies manage their customers with literally dozens of programs. From green screen emulators and Windows client/server applications to browser-based screens, agents may be called upon to flip screens time and time again even to answer the most basic customer query. Such scenarios have bypassed a coordinated agent desktop effort in favor of asking each individual agent to use his or her brain as a data clearinghouse and relay center, putting unnecessary pressure on employees and introducing far too many potential points of delay or failure.

The single, unified agent desktop can pay rapid dividends throughout the organization. Changing needs, including new customer priorities, new business processes and new contact channels, put constant pressure on IT to update agent-facing systems to support new functionality. With a unified desktop such as Synchrony™ Universal View, technology specialists no longer need to customize multiple software installations when new business initiatives require a change in the display and management of customer data. All interface changes are managed in a single, standards-based application, and as a result, all changes are published to the entire agent community at the right time.

For companies that need to roll out new agent desktops rapidly, whether growth takes place in a single contact center or a widely dispersed “virtual contact center” model, thin client design is a must. Thin clients extend the life of desktop PCs, as they are generally less resource-hungry than their thick-client counterparts and can therefore be run more reliably without engaging in two- or three-year refresh cycles on each agent desktop. More importantly for total cost of ownership, thin clients require far less maintenance on the client PC, since only the operating system and web browser components must be maintained, rather than a plethora of independent software, each with its own patch and upgrade schedule.

Adopting Synchrony’s thin client for a universal agent desktop without changing the core functionality of your customer organization provides the ultimate in choice and flexibility. Unlike a dedicated point solution, the underlying client logic is not tied to the choice of agent display. The business rules and functionality can be optimized independently of the “last mile” to the agent desktop, ensuring that both are tailored to best meet the needs of your enterprise.

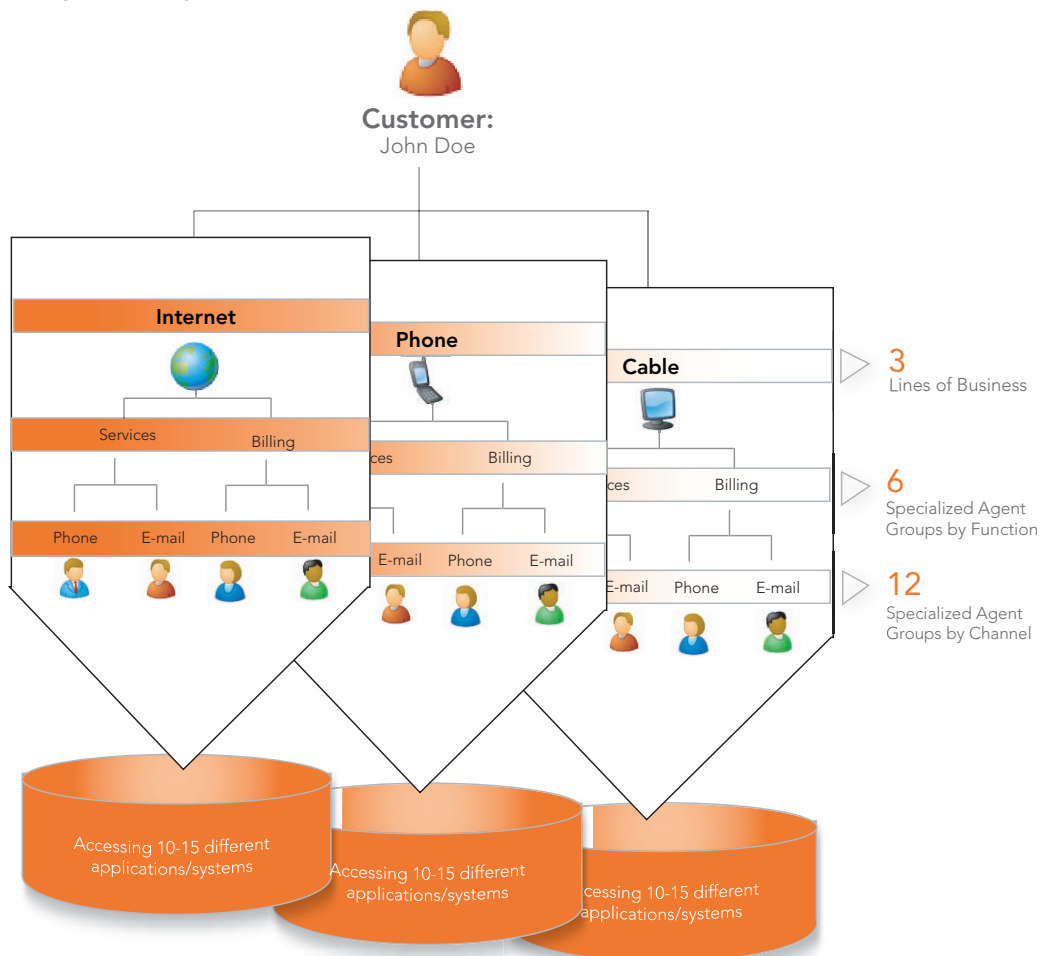
## Case Study:

### Large Cable Company Puts Knowledge to Work

A large cable company provides several core consumer and business services, including high-speed internet access, digital cable, and digital telephony services. Before, each product line had its own separate and unique groups of customer service agents, divided further into subgroups based on interaction channel. Each group used different systems, processes, and channels and lacked access to customer information outside the group. This structure not only created operational and financial inefficiencies, but inconsistent and time-consuming service led to customer dissatisfaction.

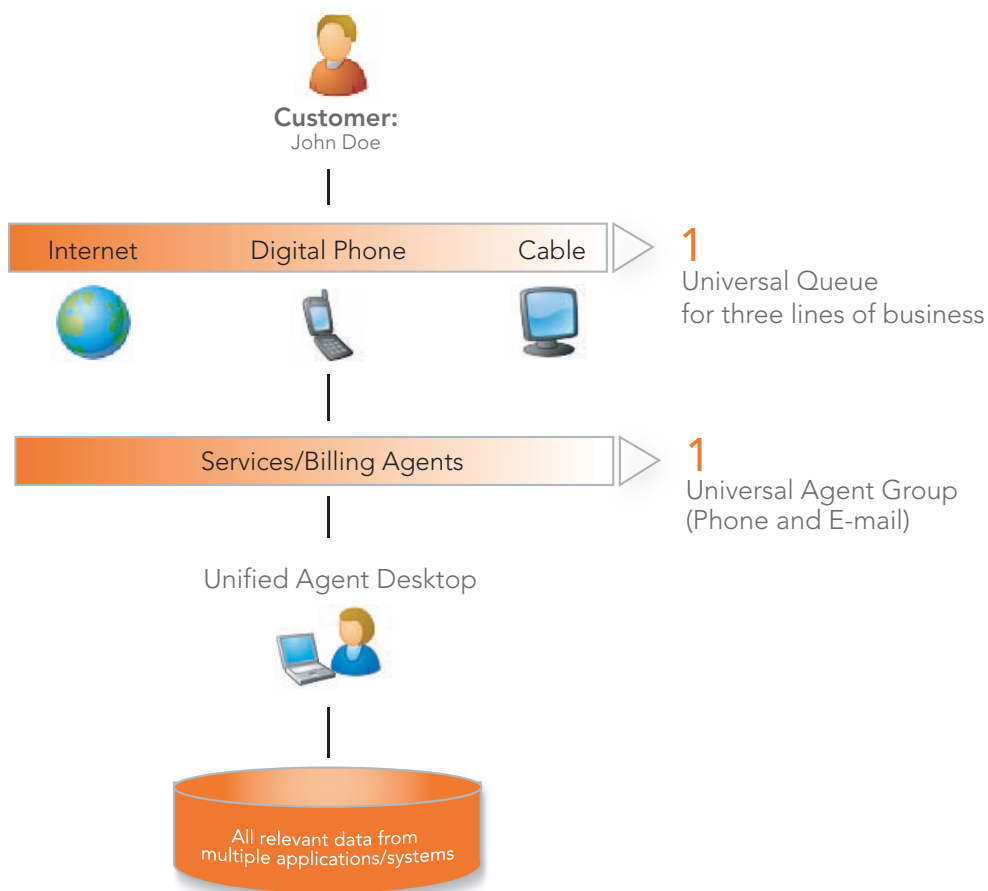
### Cable Company Specialized Agents/Disparate Systems

Before Synchrony



## Cable Company Universal Agents/Unified Desktop

After Synchrony



### The Unified Agent Desktop Delivers Rapid Returns

- Agents utilized across all product lines
- Average handle time dropped 77 seconds, contributing to a three-month ROI
- Agent desktop dynamically populated for a complete view across all product lines and channels
- Relevant resources presented to agents for faster response
- Reduced new agent training by three weeks, saving \$5 million annually
- Eliminated 10 minutes in system log-ons

## Dynamic and Contextual Information at Your Fingertips

A unified desktop is a meaningless improvement unless it is accompanied by a unified view of the customer. The best unified desktops look at each customer as a single contact entry that may be referenced by numerous unique identifiers, such as a phone number, account number or contract ID. A sophisticated customer identification system such as Synchrony's "e-address" makes it possible to identify a customer and call up a complete, detailed history based on any one of their recognized unique identifiers. Rather than requiring customers to recall various identification methods to suit the needs of different service applications, customers may identify themselves with the one method they are most comfortable with or have closest at hand.

Using a single e-address as the portal to a complete customer record allows agents to transfer and escalate callers without missing a beat. All calls transferred within the Synchrony network carry e-address data, ensuring that the same view to the customer opens on the receiving agent's desktop, saving precious seconds with a valuable customer instead of forcing the escalated caller to reiterate his or her personal details.

The universal desktop also serves as a crucial knowledge-management tool. The term "information age" was once little more than a hopeful prediction, but the unchecked expansion of data and information sources in the enterprise proves that it is well upon us. Any technological barriers that once prevented the instantaneous delivery of crucial documents or analytical resources to the agent desktop have long since been smashed. Now, however, the sheer glut of information is itself an impediment to effective service.

Obviously, the right answer is not to pull back on the creation and distribution of corporate knowledge. Instead, companies must focus clearly on understanding all of the information resources that are available to agents at the point of interaction and devise strategies to deliver the best insight that the collected intranets, websites, PDFs, documents and spreadsheets have to offer. Agents need a resource panel that provides in-context access to the most relevant information at each and every step in the call resolution process.

Synchrony offers a resource panel that updates critical links, facts and figures, keyed not only to the e-address of the customer being served, but also the nature of the contact, such as a specific product or service. This approach saves crucial seconds or even minutes on every call, eliminating the need for agents to browse through complicated knowledge libraries or struggle to craft the correct search query to suit the present challenge.



*Synchrony's resource panel updates with critical links, facts, figures and resources based on the customer being served and the nature of the interaction.*

Another key component of a tightly managed knowledge strategy is the ability to present agents with the best workflow tools for any call. Many contact centers that support a number of different product groups and customer campaigns face a difficult challenge – they can deploy different systems to service each customer group, or employ an inefficient and generic view that attempts to manage all customer interactions but is not very well-suited to any. However, an intelligent, unified front end such as Synchrony can be automatically adapted to present dynamic content based on call type, product group, or even an individual marketing campaign. This enables workflow designers to present agents with the best tools and resources to handle every interaction.

It is not only important for the content of the desktop to dynamically change based on the interaction, but the ability to change and adjust the physical appearance of the desktop is critical as well. This is particularly important for a business that has multiple product lines or an outsourcer serving multiple clients. For example, the ability to adjust colors, fonts, graphics, and fields lets you create a unique look for customers, campaigns, or products. This makes it simple for agents to know where they are while still maintaining a consistent and familiar desktop.

## Interact With Customers the Way They Want

The multi-channel customer is a modern business reality. Customers expect to be able to reach the companies they do business with through any means of communication that suits them, and they expect each inquiry, regardless of the medium, to be handled with the same degree of competence and professionalism. This puts tremendous pressure on business to be able to field all channels of inquiry equally well, and with an equally well-trained staff.

Unfortunately, the very nature of contact-channel pressure has contributed to the unwieldy growth of multiple agent desktop applications. As new channels are added, best-of-breed solutions have been the first out of the gate to address the unique challenges of dealing with the particular challenges of those contacts. This expansion quickly puts companies in a position where they must either add yet more tools to each agent's arsenal (and invest the necessary time and resources on training for the new application), or split the agent staff into dedicated channel teams, which is not a realistic option for many companies where resources are constrained and multi-channel agents are a necessity.

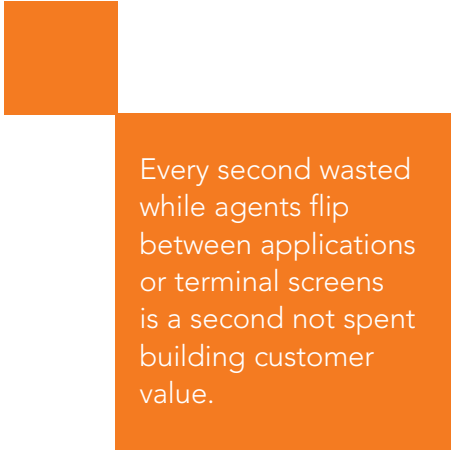
Rather than allow technology to dictate staffing strategy, use technology to take the channel conundrum out of the staffing equation. A coordinated, single-desktop view such as Synchrony Universal View enables agents to handle multiple contact channels with the same proficiency, because customer data and resolution tools are presented in the same, familiar interface. The unified view makes it much easier to integrate agents into a universal queue that manages incoming and outbound contacts through multiple contact channels. Agents no longer need to manually change applications or nominate themselves for a particular contact queue. All contacts are presented through the same interface and allow the agent to focus on developing customer-service skills, rather than technical proficiency with a dedicated chat client or e-mail tool. At the same time, in some businesses, it does make sense to have specialized agents who handle phone or e-mail exclusively. But even though a telephony-based agent may only talk to a customer on the phone, it is critical to have a view into the transcripts of e-mail and chat – all of which are compiled and accessed on the unified desktop.

Customer patience is not infinite, and the amount of time any customer will allow for any call can be impacted by any number of factors – only some of which you can control through the contact center experience. Every second wasted while agents flip between applications or terminal screens is a second not spent building customer value. Every repeated request for information is one less opportunity to ask the customer questions that could have a positive impact on the depth and longevity of the customer relationship. Few customers have the patience to sit through a long-winded cross-sell pitch after giving out their account number for the sixth time.

For a contact center to execute forward-thinking, revenue-generating strategies, it must first exhibit mastery of the very basic elements of customer service – acknowledging, processing, and reacting to customer needs. And it must do so with ease, rather than perpetuating a system of redundant questions and spluttered apologies for long wait times during a service session.

Data entry accuracy benefits from the unified knowledge approach as well. Re-keying becomes a thing of the past in a properly implemented universal desktop environment. Agents no longer need to recall the correct systems to enter a new customer record or service request. Desktops such as Synchrony simply display the relevant fields in a logical and easy-to-understand format, and the back-end integration automatically populates new data and changes to all appropriate internal systems and databases. Post-call work goes down, and accuracy goes up as a result.

Bolstering the speed and clarity of information delivery in the contact center also has an immediate impact on first-call resolution – an increasingly popular and relevant metric of success in customer-service engagement. Presenting the best information and tools to agents through a coordinated interface guides them to the ideal resources without having to engage in guesswork or blind hope that they will choose the most relevant back-end system to resolve the customer's problem.



Every second wasted while agents flip between applications or terminal screens is a second not spent building customer value.

## A 360-Degree View

Customers implicitly expect that companies understand the history of their interactions. In a heterogeneous environment without coordinated knowledge, agents can try their best to be sympathetic to this position, but even time spent in good faith delving through several different customer record systems cannot help but betray a lack of institutional memory. Knowledge of customer history is only useful if it can be quickly and readily accessed by any agent, at any stage of an interaction, and across any product, service, department, or geography. A unified agent desktop provides critical insight by acting as a customer activity hub, a clearinghouse of information that displays not only all customer-service tickets, but also a customer's purchase, billing, and miscellaneous service activity throughout the entire organization. Through this activity insight gained from applications such as Synchrony, agents can more quickly understand the complete picture of the customer's relationship with the company. Billing discrepancies and service interruptions, for instance, can rapidly be correlated by an agent who is provided with these essential facts. Complete activity tracking and association also presents the agent with a complete understanding of pending or open tasks associated with a customer, allowing the agent to follow up on a pending service inquiry, or close the deal on an upsell opportunity that the customer had started but never completed in a previous contact session.

Uniform activity tracking also expedites the call transfer and escalation system. At any time during the customer interaction, the unified desktop provides the necessary escalation tools without requiring a lengthy hold-and-transfer period while the agent wraps up activity logging in multiple systems before calling up a specific escalation program. Because all activities are tracked, the escalation process appears virtually seamless to the customer.

## Knowledge to Power the Smart Agent

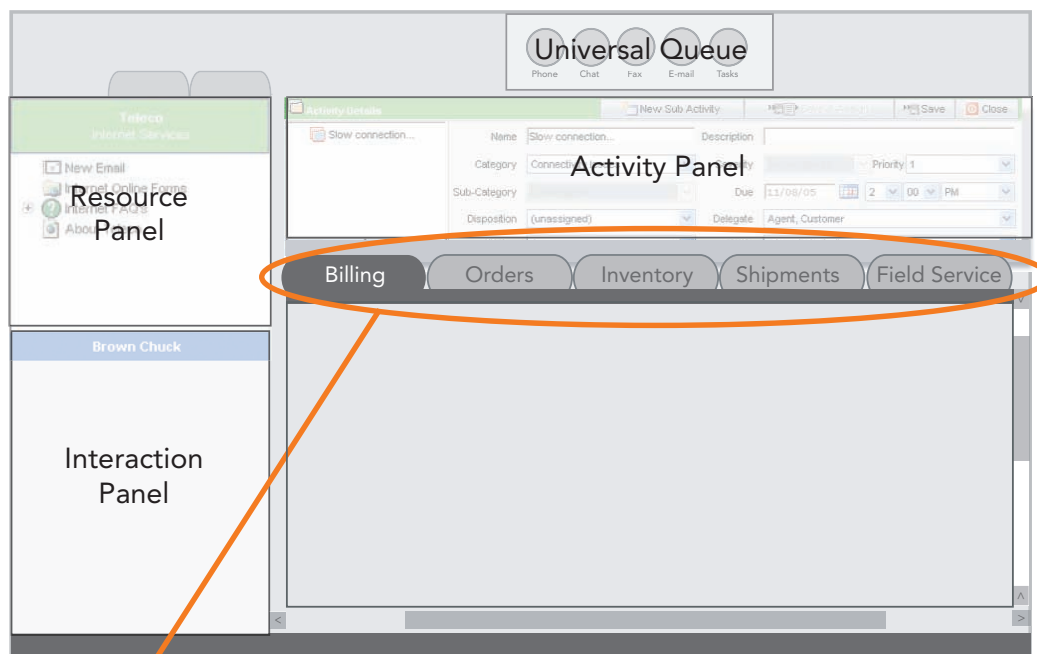
The only way agents can be productive and meet their performance and satisfaction targets is to understand the slate of tools at their disposal. As a result, companies that persist in relying on multiple disconnected agent applications on the desktop condemn themselves to lengthy, complex agent training practices that must touch on each and every application, documenting all of the use cases, dependencies, and quirks of each one. This is expensive and time-consuming. The alternative, skimping on agent training, leads to wasted time, increased escalation, and lower customer satisfaction.

Unifying the agent experience into a single, consistent desktop takes the complexities out of the training process. By promoting a single, browser and tab-based approach that is widely understood by computer-literate professionals, enterprises can streamline the agent education process, making it easier to bring new agents online without spending weeks in technical training. Cutting out lectures on green-screen etiquette also frees up more time for value-boosting activities, such as cross-selling briefings and product education.

Fundamentally, people enjoy being good at their jobs, and they enjoy being provided with the means to do their jobs well. Knowledge empowers the Smart Agent, and ready access to appropriate information for each caller makes the challenge of a diverse customer base much more manageable and enjoyable for front-line employees. Job satisfaction is closely tied to the ability to understand and execute on the tasks at hand, and the unified desktop is an important tool for employee empowerment.

Don't mistake the concept of a "universal" desktop with one that is inherently inflexible or ill-suited to a diverse work environment. On the contrary, the universal desktop concept is particularly well suited to diverse, complex working environments because the desktop view can be tailored to instantly adapt to the task at hand, whether that is categorized based on user role or access clearance, or the topic of the customer interaction at hand. Universal desktops such as Synchrony can be quickly configured to support multiple departments and multiple customer campaigns simply by implementing rules that dictate how the Synchrony desktop will appear to each user, depending on the circumstance at hand, all without requiring the user to change applications or even know what functionality they will need at any given time.

## Synchrony Smart Tabs



Smart tabs increase productivity and efficiency by giving agents access into the multiple applications and systems they need to do their jobs – quickly and accurately. Based on the purpose of the interaction, the tabs change dynamically.

### Just-In-Time Knowledge and Contextual Functionality – Synchrony Smart Tabs

For the customer, choice is king. For the agent, however, choice can be a dangerous enemy. Agent environments that call for several customer management programs to be open or available at once vastly increase the chances that even a well-trained agent will choose the wrong screen or program to address a customer inquiry. Although CTI integration and screen pops can offer “best-guess” guidance, the fact remains that when agents are required to open many screens to help customers, accuracy drops.

In an ideal environment, agents are provided with only the functionality that is relevant and necessary for resolving the customer’s current inquiry. Synchrony makes this possible through the use of Smart Tabs, which present integrated functionality in a context-sensitive manner based on the current activity or query being pursued. Smart Tabs can also be opened and pre-populated, which leverage the e-address system to clearly identify the customer and present a clear path to the most likely action necessary to resolve the call.

Compartmentalizing functionality in this way ensures that agents are presented with the right choice for every situation, and are at virtually no risk of assigning a commercial service order to a residential service crew, or placing replenishment orders through the wrong credit approval system. The goal of such organization is not to remove power and discretion from the agent’s hands, but to ensure that complexity is not a hindrance, and that agents are guided to the tools most likely needed to solve each and every inquiry with speed and confidence.

The Smart Tabs system provides instant efficiency gains for the contact center organization. Integrated tabs eliminate the need for multiple application load times and sign-ons, sparing both agents and customers the tedium of wading through password recall and record-retrieval delays. Smart Tabs also make it much easier for agents to select the correct functionality for the task at hand. Tabs can be grouped by functionality and likely need, blending the capabilities of multiple applications on a single tab. Compare that to static, stand-alone applications, which can only display their own information, or be customized at great expense to integrate data from an outside program. Smart Tabs also reduce the ramp-up costs each agent incurs when setting up the desktop for the day’s activity.

## Leverage What Works – and Keep It Simple

Increased and streamlined access to knowledge is a critical component of contact center modernization efforts, and it is certainly clear that the distractions and ambiguity created by too many applications on the agent desktop are a hindrance to the smooth flow of information. As a result, some vendors and consultants see a modernization effort as an invitation to “rip and replace” functional systems and architecture with a completely new, and in many cases, completely untested platform. The promise is a single-business operating platform.

What they sometimes deliver instead is an application that does far less than advertised, far later than was promised, and which in the final analysis, does not even work as well as the systems it purported to replace. In these scenarios, single sign-on is not achieved, and knowledge remains just as locked up and frustrated as it ever was. Even in best-case scenarios, the end result is no different than a coordination layer that acts to blend, unify, and synchronize the proven, time-tested systems that run your business today.

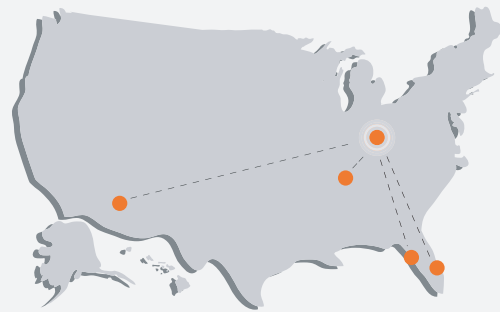
The universal desktop approach, on the other hand, acknowledges and honors the fact that the systems that run your business today do so for a good reason – *they work*. Whatever they may lack in front-end integration, at their functional core, they are the time-tested, battle-hardened programs that are tightly integrated into your everyday business. Taking them offline for the promise of a new application is a gamble, and more importantly it is a gamble most companies need not take at all. Valuable knowledge transfer can be promoted by building a common, unified front end to these valuable back-end systems using clearly defined web services standards.

The result, provided by applications such as Synchrony Universal View, is the best of both worlds – an agent desktop built on the same key functionality that already powers your business, but delivered with the coordination and ease of use of a modern, thin-client. Functionality need not be compromised, re-invented, or even taken offline during the transition. Such rapid system integration at the desktop means faster resolution at the customer level, and far less service interruption and migration time for the organization, all without the expense and tension of a “rip and replace” operation.

## Knowledge Beyond the Traditional Contact Center

A universal, thin-client, customer service desktop makes the concept of an “agent anywhere” a distinct reality. When knowledge is coordinated centrally, there is no need to maintain an individual library of corporate information on each desktop and terminal – the universal desktop is the gateway to knowledge no matter where the employee may be. Rather than relying on IT to deploy and update numerous custom applications on all kinds of laptops and remote terminals, company representatives can virtually join the customer service organization from anywhere with an internet connection. This not only speeds the deployment of virtual call centers, but makes it possible for multi-discipline staff to join a customer-service effort at any time, whether the need is created by a site shutdown due to a natural disaster or simply a heavy volume of customer inquiries. (See the figure below.)

### The Virtual Contact Center and Emergency Preparedness



*"Hurricane Wilma made a direct hit less than 20 miles from the headquarters of Fine Art By Hyatt in Naples, FL. With hosted Synchrony, our agents in the Midwest and Western states were able to cover the phones while we were covering our heads to protect from Wilma. We never missed a beat as far as taking customer orders was concerned!"*

- Larry Block, Fine Art By Hyatt

Bringing the entire contact center in sync with the same customer-service desktop has a significant benefit for management reporting and understanding as well. Because all agents have the same tools and techniques at their fingertips, it is possible to make meaningful, apples-to-apples comparisons between all of the agents on the service force. Other metrics, such as customer cost-to-serve and cost-per-sale are also free of distorting variables.

Management is also more clearly able to see the impact of call resolution, because call closure procedures are uniform, no matter what back-end functionality comes into play during the course of the call. Compare that to a contact center using several customer-service desktop tools, where post-call procedures may differ by application and involve inconsistent closure status codes, or not even offer the same abilities to record the status of the inquiry and the customer's post-call disposition. A consistent view into post-call activity makes understanding customer life cycle and retention trends much easier.

The universal desktop view also makes it considerably easier for constituencies such as Sales, Marketing, and Finance to understand the customer-service business processes at play and tailor their own activities accordingly. Marketing and the contact center, for instance, can quickly find themselves at odds if customer campaigns are launched when the support staff is not prepared for an increase in call demand or the new requests that will be generated by customer response. When marketing and service can work together, using a common frame of reference provided by the universal desktop, such conflicts are far less likely. In fact, the thin-client accessibility of Synchrony enables employees and executives across the company to see the exact customer service experience, without the need to deploy additional programs or special access on the user's desktop.

## The More They Know, the More You Grow

Every aspect of modern business runs on information, and the contact center is the hub of knowledge flow, both into and out of the organization. Bringing sensible presentation and a unified view of critical business data to every agent desktop is a meaningful and critical way to rationalize the powerful yet uncoordinated applications that drive each and every customer touch, and improve client value at every opportunity.

Every touch in the contact center, whether inbound or outbound, represents a unique and immediate opportunity to extend and strengthen a customer relationship. Each interaction, whether it is a sale or a save situation, requires that your agents be prepared to respond quickly to the unique demands of the individual customer, and have the best decision support available. The universal desktop gives your organization the best chance to make the right decisions for customer satisfaction and profit growth, each and every time a customer picks up the phone.

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