



## A Guide to Buying Inbound Call Center Technology

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### **Abstract**

The varieties of choice available make buying ACD and workforce management technology a challenging task. Thinking about key requirements for ACDs and workforce management can help managers narrow their choices. Today's call centers require technology that is flexible, reliable and capable of performing the planning tasks needed by multi-site centers staffed with multi-skilled agents. Different kinds of call centers have different workforce management needs, but managers need to consider potential future changes or growth when they make a workforce management decision.

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### Introduction

Eighty-five cents of every dollar spent on call centers falls in one of two categories: People costs (70 cents) and network expenses (15 cents). Call center managers who can wring higher productivity out of these areas without sacrificing quality can look forward to a profitable operation.

It's estimated that a full-time employee in a call center costs a company about \$40,000 per year. Even a five percent drop in labor costs, through improved scheduling and workforce management, can dramatically improve your return on investment.

As outbound telemarketing centers add inbound capabilities, performance and profitability take on even greater importance. With widely varying patterns for inbound and outbound calling, buying call center technology often seems to require the wisdom of Solomon and the patience of Job.

Today, managers demand systems that reliably forecast call volume, schedule employees and analyze operations, all in easy-to-use formats. They also want systems that predict the skills and staffing required for any call arrival rate, prepare budgets and determine optimal staffing of full- and part-timers.

### Technology Needs: ACDs and More

With today's technology, there are more choices than ever before. Automatic call distributors (ACDs) can be part of a PBX, can stand alone or be networked, on customer premises or in a telecom provider's central office.

Often, when upgrading call center technology is discussed, the first response is, "Buy an ACD." An ACD is needed — and much more. Besides automatic call distribution, a call center manager needs an efficient way to leverage the call center's most important asset — people.

Managing personnel is the secret to making a call center a success — and that means a workforce management solution. And a larger issue is often overlooked: managers need tools to really manage a call center, not just generate schedules or forecasts. Since inbound calls aren't controllable, the only control point is tied to the call center's most important and largest resource: people.

Choosing a workforce management system can be as complicated as picking an ACD. The one that's best should help you solve the business issues that are most vital to you, today and tomorrow.

Here are some key questions that can point the way to choosing both an ACD and a workforce management solution:

- Will you be using an ACD for inbound calls only, or mixed inbound and outbound calls?
- How big is your center, and how large do you expect it to grow? Single site, large multiple sites, or network sites demand greater power and flexibility in system design. The best systems integrate with and constantly talk to intelligent pre-answer call routing.
- Will you be setting up multiple types of shifts (part-time vs. full-time, expanded hours or days of operation, rotating shifts, preferred days off, changing start times, etc.)? Be leery of workforce software with restrictions.
- Will the ACD include a skills-based call routing capability? If so, a skills scheduling-enabled workforce management solution should solve the complex issue of how many agents with multiple skills must be scheduled when.

- How strategic is the business transaction that will be conducted through the ACD? The more strategic the transaction, the more important call processing speed and quality of the hardware and management systems become. More value should be placed on systems that provide accurate and meaningful information to all system users instantly, and deliver high-quality performance.
- What is the vendor's reputation for supporting you after the sale? Will you be entitled to periodic maintenance releases? What is the vendor's history over the past two years? No releases, or too many, may signal vendor problems.
- Can you count on the vendor to move the product forward? Will the vendor draw on its technical and human resources to meet your unique needs?

Answers to these questions (and many others) will help you select the workforce management system that is the best match for your call center needs.

### **Differentiating Workforce Management Systems**

One workforce management system may appear to be very much like another. But beyond meeting the most basic requirements such a view is flawed. Long-range planning demands not only forecasting and scheduling, but also budget planning. With budget planning, a manager must be able to choose planning Options, such as variables for special events throughout the year, customer type or day of the week. A sophisticated, flexible workforce management system should offer all this and more.

Selecting a system based only on its forecasting and scheduling capabilities can be short-sighted. After two or three months, when forecasting and scheduling take 20 minutes instead of days or weeks, the question arises: can your system also handle long-range planning, intra-day planning or total management of the operation?

An entry-level system is all too often the wrong answer. It may not be able to perform the managing, budgeting and planning tasks you desperately need, or may require so much time and effort as to be counter-productive.

Remember that an ACD is not designed to provide all the management functions you may need. The ACD's basic purpose, after all, is to distribute calls to the next available employee. Technology can also produce regular reports (usually every half or quarter hour, though many systems now support real-time reporting). But relying solely on reports of what happened is like looking in a rearview mirror: it can only show what's past, not what's ahead.

To be effective, managers need all the clues they can get about what to expect for the balance of the day, next week or next month. And that's what a workforce management system provides: a sophisticated way to use today's or yesterday's information to point the way to effective future actions and solutions.

No workforce management system can predict how many calls will come in at any instant. Each call is a random event. But it can give managers a game plan to follow to forecast, schedule and budget effectively. In stand-alone or networked call centers, a workforce management solution must understand and help control productivity. Output per employee affects scheduling, planning and every other issue.

A workforce management package should schedule both inbound and outbound calls, quickly add and delete employees, schedule training and group meetings that aren't call-related, and instantly show the effect of these activities on service. It should also help you gauge the cost of bidding new business and support delivery of service, which may differ not only by the type of program being managed for a client, but by the day of the week and time of day.

As a rule of thumb, workforce management software should have few if any restrictions. Managers constantly battle to meet productivity and quality goals, and they must have the flexibility to change direction on a moment's notice, based on accurate, meaningful information provided by the system to all system users.

Today's state-of-the-art workforce management system should also be based on proven client-server network architecture. Also critical is real-time control of call center operations, preferably with PC work stations and software such as Windows. Workforce management systems and call routing are two sides of the same coin in modern call centers. The best systems deliver an integrated view of operations and sophisticated methods of using today's or yesterday's information to make your call center function better tomorrow.

Intelligent call routing technology lets call center managers influence calls in ways impossible a year or two ago. Call routing systems can be set up to make particular ACDs the "first choice" to handle a call based on the proximity to the caller. But if the designated ACD is inundated with calls, technology can scan all other ACDs to find the best fit for this particular caller.

By scanning the system's database, a caller can be categorized as a first time caller, a high volume customer or high-ticket buyer. The system in turn routes the call accordingly, perhaps to a preferential service agent group.

Call routing technology can also send a call to an interactive voice response unit to determine if it is an order or a service call. Orders can be put in preferential customer queue. Calls can be handled uniquely.

Integrated workforce management with call routing and simulation tools lets managers choose the customer policy to be played out for a particular caller. Whether it's providing customer service, product sales, or providing information, an integrated customer plan can now be implemented.

As call center complexity increases, keeping your options open is especially important. There's no solid business reason to link up with just one network carrier or ACD vendor. As a general rule, look for suppliers of workforce management solutions with a track record of proven expertise and capabilities in both single and multiple call centers.

Whatever your plan is, it definitely doesn't have to involve buying from one ACD vendor or network carrier. Network based services and ACD based services should be shopped extensively for the best deals, just as travelers shop for airlines and fares. More importantly, workforce management system vendors shouldn't be tied to a single ACD manufacturer. It's to your advantage if they are independent in their business alliances, and thus able to work with any ACD supplier.

### **Call Center Scenarios**

There are almost as many call center scenarios as there are call centers. But here are some of the likely ones, along with important workforce management considerations for each:

- Start-up operations looking for their first ACD and workforce management system. Look for ease of use and the ability to use system features when you grow and need them, at no additional cost.
- Existing call center with an ACD and manual workforce management process. Can you afford to live with fixed schedules, poor planning and higher costs than your competition because of a manual system? Search for a vendor with a system that can instantly produce multiple forecasts, fixed and flexible what-if schedules, and eliminate the pain of vacation and holiday scheduling. Don't accept a "one-size-fits-all" solution. You'll outgrow it all too soon.
- Call centers with an ACD and minimal workforce management mechanization. If you expect no growth or shrinkage, you may get by with what you have. If your business is growing, ask yourself if your current system is helping you grow with the fewest number of people and the greatest profitability. If not, you're outgrowing your system. List everything you wish your current system could do, and go shopping for the system that does. It's out there, and it could make you a hero.
- Multi-location call centers requiring ACD networking. Yes, there is a proven workforce management system that can remove the mystery of harnessing the power of networked ACD technology. You'll be able to determine call routing table adjustments based on site productivity and the availability of employees at each site. Demand a solution that does everything you deem necessary and more. You need it to stay competitive.

Buying inbound call center technology is both art and science. Tap into the best resources available to you: workforce management software vendors, consultants and other telemarketing professionals.

The challenge is to decide what best fits your unique situation today and in the near-term future. Not all systems are equal, and one size definitely does not fit all.

Your reward for patient research and managerial wisdom? An efficient, full-functioned ACD and workforce management system that produces the quality and profits you're looking for.

### **About IEX**

IEX, a Tekelec company, is a leading provider of innovative productivity solutions to contact centers. TotalView Workforce Management solutions significantly reduce operating costs while enabling superior service. More than 2,500 centers with more than 630,000 agents worldwide work with IEX to improve planning, enhance performance, streamline tasks and integrate data. More information can be found at <http://www.iex.com>.

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