



Technology Optimization Part 7: Computer Telephony Integration

By Lori Bocklund, President

The National Association of Call Centers | Volume 4, Issue 13, June 26, 2009

Computer Telephony Integration (often equated to “screen pops”) has long been on every center’s wish list, promising to shave seconds off every call and improve customer service. For many, it has been the elusive technology they could never afford. For others, it’s the investment that fell short on benefits and long on costs. If we take a look at why, I think you will learn some things that help you get more out of what you have, or what you are planning for, to drive both savings and improved service.

For those who fall into the “could never have” or “don’t have” categories, CTI seems cost-prohibitive, overly complex, and/or too much trouble to find the right solution. In a worst case scenario, some wound up with “shelfware” after a failed implementation. Others suffered a breakdown in the “I” of CTI – perhaps after an upgrade to one component – and the systems stopped talking to each other. If CTI is not delivering high benefits, keeping it running is not a high priority.

For those who fall into the “short on benefits and long on costs” category, CTI is a disappointment. While CTI can pop screens and save time, the value depends on having a good way to identify customers, a high likelihood of matching that identifier in the database, and a good screen to pop. For many, there really is no good identifier, meeting all the criteria from both a customer and company perspective. Or, the identifier has a low “hit rate” in the database. For example, phone numbers are a customer-friendly identifier, but the database may not be up to date. And in a world with home phones, cell phones, and work phones, how can the company keep up? Even for folks who navigate this challenge successfully, the “popped” screen has to be more than a weigh station before heading to 14 other screens in six non-integrated applications, forcing re-entry of customer data after all.

Several years ago, I wrote that I wished the acronym CTI would go away. It’s confusing because to many it means only screen pops, but the technology can do so much more. Unfortunately, few do more with it – and therein lies another reason for poor cost-benefit results. If you only pop screens, you miss the opportunity to do sophisticated routing, such as multimedia, multi-site, and data-directed routing based on information stored in your database. Perhaps you have outbound dialing requirements, or should provide coordinated voice/data transfers and conferences. And almost every center could benefit from better reporting, including “cradle to grave” call tracking and information that ties outcomes to contact handling. Maybe a softphone that puts agent controls for login/logout, workstate changes, and performance statistics on the desktop would be a time saver and performance enhancer. All too often, these “CTI” capabilities aren’t planned or implemented.

In spite of its challenges, there are ways to optimize CTI technology and its application in the center, whether you have it today or are planning for it tomorrow:

- If you don’t have it and can’t afford it right now, look at ways you can implement a “poor man’s” version. See if you can display information on the phone, or “whisper” it to the agent prior to connecting the call. While these options aren’t as sexy as a screen pop, they deliver some savings while improving the customer experience.
- If you do have CTI and it performs poorly, conduct an audit and define actions to improve performance. For example, if you have a low database match on screen pops, see if there are ways you can update your records. Some centers contract with third party services to update phone numbers. Others ask reps to update customer info on every call, investing a little to save a lot. Look at



end-to-end integration between your ACD, IVR, CTI, and desktop applications. And make sure your processes don't compromise payback – for example, requiring customers to confirm information they provided and the CSR received. An audit will help you identify and address these (mis)steps.

- If all you are doing with your CTI is popping screens, look into the licensing fees and integration required to support added functionality that may benefit your business, such as outbound calling and data directed routing. Or, look at ways to optimize the desktop to streamline the call process.
- If you don't have CTI yet, start looking at low cost ways to implement CTI; the market offers options today. Talk to vendors about their strategies and solutions to help you achieve your business goals at an affordable price. Consider Session Initiation Protocol (SIP), bundled capabilities, and less complex, lower cost CTI software. High functioning and high value CTI doesn't have to be out of reach for your center and your customers.