

Tech Line



UC and Web 2.0 in the Contact Center

By Lori Bocklund, Strategic Contact

Web 2.0 may be the catalyst that unified communications needs for engaging the rest of the enterprise in customer care.

As a rule, contact center vendors, analysts and consultants aspire to be conductors on the industry's transformational trains. They cast visions of great and promising futures tied to new strategies, processes and technologies, and revel when companies come running to the sound of their: "All Aboard!" For the past few years, unified communications (UC) has been the much-ballyhooed railway of choice. Yet in my experience, few contact center professionals lined up. For many, UC was just repackaging a bunch of existing technologies; others simply ignored all the fuss. Now a new train called Web 2.0 is pulling into the station, powered by its own steam and running with some new conductors — and it may just have a big enough engine to carry other technologies with it. One wonders: Can Web 2.0 turn UC's hype into reality for the contact center?

UC Seeks its Place in the Center

Historically, the call center was left to its own devices to care for customers while managing service delivery. It was a cost center aspiring to evolve to a profit center where it held some chance to protect or drive revenue. Then "unified communications" came along, driven by industry buzz, promising to revolutionize call center operations and their enterprise connections.

This umbrella term encompasses many capabilities in communications and business systems, most of which already existed under other names, such

as unified messaging, workgroup tools like presence and instant messaging, mobility and many other terms, including typical contact center technologies such as computer telephony integration. I've often thought lists of what *isn't* part of UC would be more enlightening than lists of what *is* in UC. Regardless, as the marketplace sought to justify investment in UC technologies, it went seeking business benefits, with the contact center a ready target.

UC proclaimed its "killer app" for the contact center — tapping subject-matter experts (SMEs) across the enterprise through visibility (presence) and collaboration (IM, transfer/conference, CTI, Web collaboration tools, etc.). UC attempts to pull the rest of the enterprise into helping achieve the contact center's mission to provide customer care (see Figure 1), with the promise of improved first-call resolution and customer satisfaction. It sounds good, but this business model presents significant challenges.

SMEs are much more expensive than front-line contact center staff, so it's not generally cost-effective to use them on repetitive, interrupt-driven communication. Many SMEs do not have the training or disposition to interact with customers. In fact, many "hide" from such opportunities, and the contact center generally lacks the organization clout to demand their availability. You need high-level sponsorship for this kind of change in processes and roles and responsibilities. And, you need to define how you manage accessibility and availability of these resources, includ-

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ing important decisions about tracking and reporting. That's a tall order. The net result: Despite the smoke, there's been little fire for the typical center.

The Potential Paradigm Shift

Web 2.0 may be stirring up a new firestorm, driven by an empowered community of external and internal users finding new ways to share and access information (see Figure 2). Web 2.0 gets some sparks from different vendors using different angles. In fact, some "Web 2.0 technology" requires no vendors, thus enhancing the community's power. Users don't have to wait for the information technology (IT) team to define, select, procure and implement something. CSRs, customers, prospects and third parties can just do it. And that can be a bit unnerving for the contact center and for IT.

Much of the early Web 2.0 activity lives in marketing, where there's a natural appeal and fit. The marketing folks monitor Twitter feeds and blogs, participate in forums and wikis, and use social media, podcasts and video sharing to promote and protect the brand. But the potential for customer care is huge. How do we answer that customer's question posted on a forum? Or, how do we make sure the answers customers are getting from the broader community are correct and consistent with our internal resources? How can we inform customers quickly, via their media and channel of choice? How do we enable CSRs to create and share information with each other more readily as they solve problems? If the contact center has information sources or solutions that the community could benefit from, how do we share those — at the right level of exposure and security — to further support our customer base?

Now consider how UC and Web 2.0 tools can work together to enable people to get the answers they need. A customer could access a "how-to" wiki or forum populated by external resources (including customers, prospects and people who just like to help) and internal resources (CSRs, SMEs, others across the enterprise). A knowledge management system could leverage wiki content as one information source, and rate it against other, more structured informa-

Figure 1: Unified Communications Engages Other Enterprise Functions with the Contact Center



tion. A CSR helping a customer could tap an SME — one who perhaps also participates directly in forums or other outlets — to walk through information in these internal or external sources. Both internal and external users could rate contributors and content to influence which information is deemed most valuable.

As a result of these opportunities within and beyond the contact center, Web 2.0 may be exactly the catalyst UC needs. It can be a tough sell to pull in other parts of the enterprise to serve customers. But when customers and prospects are serving themselves by using Web 2.0 tools or groups across the enterprise start using Web 2.0 tools for communication and collaboration, it makes sense to look at these phenomena and begin to formulate an enterprise strategy that includes customer interaction. Combine Web 2.0 with UC and companies may really reach a new level in contact centers. Whether we achieve grand heights of "transformation" or not is to be determined, but Web 2.0 makes it more likely.

So the big question is: Where do UC and

Web 2.0 fit with the contact center, and with each other?

Finding UC's Fit with Web 2.0 and the Contact Center

Companies need a strategic approach to these technologies that makes sense for the business, contact center and customers. You may consider an evolutionary model for customer interaction as described in Table 1.

In the traditional model, the contact center focuses on customer care. Technology routes and reports, and offers self-service, systems and databases, and performance management tools. The world is very formal, structured and measured. It provides both self-service and assisted service, with CSRs as gatekeepers to system- or human-based information.

In the UC model, we add enterprise resources to the mix. The "new" technology enablers include IM, presence, and conferencing and collaboration tools. You choose whether the environment is formal or informal. For example, do you schedule

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SMEs, have them login, track them, report on them? If so, you can call it UC if you want, but that's just another contact center group with some different operational rules. If SMEs are informally available and tapped via presence, IM and other tools, you need to address the "what-ifs" on process issues when no one is there, when they are over-used as a resource (and therefore, may go into hiding), or it starts to get expensive. UC-based SME access is most often pitched with informal structure, but companies need to address whether the contact center can really make it happen. Then, any specific implementation must address the question of whether SMEs have "contact center" licenses. If not, the processes must address what happens when a contact leaves the structured, tracked and measured world.

For example, a Fortune 100 manufacturing company tackling this issue had to look at the access to and availability of its SMEs, as they were critical to addressing many callers' questions. The company chose to *schedule* engineers and others with in-depth knowledge into pools each *logged into* approximately four hours per week (and thus were subject to *tracking and reporting*, as well). They also worked to move more information to knowledge management so the reliance on the SMEs decreased. This approach proved more appealing and effective — for the company and their callers — than an informal approach using presence and IM with ad hoc availability. Very high-level sponsorship and focused change management and training were critical success factors.

The Web 2.0 model adds external resources to broaden the community, and enablers such as wikis, blogs, RSS feeds and social media. A company can have some formal elements in the world they control, likely driven by marketing. For example, a retail Web site may have product ratings and comments from customers. The engaged retailer responds to low scores with notes about how they addressed the issue for that particular customer, and what they've done to address any product issue, turning a potential negative into a positive.

Web 2.0 is informal by nature on the external resources, as companies don't get to con-

trol who engages and how (although they do control whether and how they engage with them). Companies decide whether to monitor and respond to customer comments and input, answer questions on forums, and monitor blogs or microblogs. Organizations tackling Web 2.0 effectively are creating "rules of engagement," training internal staff to be participants in the Web 2.0 community, and defining the boundaries between the internal world (e.g., CSR to CSR, CSR to SME and the information they share) and the external world (customer/prospect to CSR or other external user).

Now consider outbound communications. Outbound contacts were traditionally business-triggered: I want to sell to you, I want to collect from you, I want to talk to you about our relationship... and I'm going to contact you when I want, how I want. Now outbound communications can also be customer-triggered: I want you to inform me when X occurs... and do it by my rules for media, channel, timeframes, etc. I will seek it when I want, or receive it automatically if I wish. And then I may pass information on to my "friends."

This example points to another relatively new buzz word for both inbound and out-

bound communications: communication-enabled business processes (CEBP). The concept has been around for a while, for example, as a Web-based capability or outbound call (e.g., alerts you set up with an airline, bank or credit card company) or a "workflow" or "business rule" built into systems (e.g., automated approvals or escalations, contact routing rules tied to customer profiles). Such event- or status-triggered communication — often labeled part of "UC" — can be enhanced through Web 2.0. On an outbound contact, the community can help promote and pass the word: You let me know, I let my community know. On an inbound contact or self-service, "boosts" from users can enhance information value to the rest of the community, various users may choose to automatically receive information from sources of choice, and additional Web 2.0 inputs may feed the end-to-end contact routing and handling process.

The bottom line: The Web 2.0 story may be more compelling than UC because it is community driven (not call center driven or enterprise driven). It's about brand, loyalty and products and services, not just customer contact. The result is that marketing is likely

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Figure 2: Web 2.0 Enables Information Sharing Across the Community



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to drive new efforts, pulling in product people and others. But the contact center is a crucial player.

It's a Brand New World, All Over Again

Everyone thinks technology moves at lightning speed. In many ways, contact center technology overall has moved at more of a slow, steady pace, due to costs, resource

demands, complexity and more. So as the next new thing comes barreling in on buyers, they need to step back, understand the opportunity and impact, and make thoughtful plans based on business goals and value. UC has been working hard to achieve an impact, but may now find a potential friend in Web 2.0 that will stir up interest beyond the center.

The good news is that this may be the catalyst we've long been waiting for to engage

the rest of the enterprise in customer care. The bad news — or perhaps just other news — is that to really make these concepts work requires an effort beyond the center, and probably not driven by the center. But we can be the most willing participants an enterprisewide, customer-focused transformation effort has ever seen. The result will be powerful benefits for the center, the enterprise and customers alike. 📍

Table 1: The Contact Center, UC and Web 2.0 Support Customer Interaction

	Traditional Contact Center Model	Add Unified Communications	Add Web 2.0
Key technology enablers	<ul style="list-style-type: none"> ▶ ACD, CTI (routing, reporting, etc.) ▶ Self-service (IVR, Web) ▶ Systems/databases, including CRM and KM ▶ Performance management tools (QM, WFM, etc.) 	<ul style="list-style-type: none"> ▶ Add ▶ Presence ▶ IM ▶ Collaboration/conferencing 	<ul style="list-style-type: none"> ▶ Add ▶ Wikis, blogs, microblogs, social media sites, video sharing, podcasts, etc. ▶ RSS feeds, widgets/gadgets, email, IM, SMS, etc.
Key players	<ul style="list-style-type: none"> ▶ Contact center agents ▶ Supervisors ▶ Trainers ▶ Analysts 	<ul style="list-style-type: none"> ▶ Add enterprise resources such as marketing, product managers, engineering, field sales/support 	<ul style="list-style-type: none"> ▶ Add community of users (customers, prospects, etc.)
Environmental characteristics for the key players	<ul style="list-style-type: none"> ▶ Formal ▶ Structured scheduling ▶ Defined routing to groups/skills ▶ Track and report ▶ Manage performance 	<ul style="list-style-type: none"> ▶ Informal ▶ Not scheduled ▶ Pick and choose who gets contacts ▶ Not tracked or reported ▶ Do not manage performance specific to customer interactions 	<ul style="list-style-type: none"> ▶ Primarily informal/unstructured ▶ Contribute, promote, augment, receive and seek information when they want, how they want, to/from whom they want
Notes on key players – typical scenario	<ul style="list-style-type: none"> ▶ Relatively low cost ▶ Managed to ensure available, accessible ▶ Key part of their job is to talk to customers and solve their problems 	<ul style="list-style-type: none"> ▶ Higher cost resources ▶ Less available, accessible ▶ Typically not their job to talk to customers to solve their problems 	<ul style="list-style-type: none"> ▶ Brings internal resources (contact center and/or enterprise) together with external users ▶ Community of users may self-serve by receiving or seeking information, or may seek assistance from the community
Communication characteristics	<ul style="list-style-type: none"> ▶ Self-service and assisted service ▶ Inbound and outbound ▶ One-to-one between external party (customer, prospect) and internal party (CSR) 	<ul style="list-style-type: none"> ▶ Adds one or more internal people to communication with external party, inbound or outbound 	<ul style="list-style-type: none"> ▶ Self-service or assisted service ▶ Inbound and outbound ▶ One-to-one, one-to-many, many-to-many ▶ Internal only, external only or combination

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Contact Center Pipeline is a monthly instructional journal focused on driving business success through effective contact center direction and decisions. Each issue contains informative articles, case studies, best practices, research and coverage of trends that impact the customer experience. Our writers and contributors are well-known industry experts with a unique understanding of how to optimize resources and maximize the value the organization provides to its customers.

Pipeline Publishing Group, Inc.

PO Box 3467 | Annapolis, MD 21403 | 443-909-6951 | info@contactcenterpipeline.com

www.contactcenterpipeline.com

Lori Bocklund is Founder and President of the independent consulting firm *Strategic Contact*.

✉ lori@strategiccontact.com
☎ 503-579-8560

