

## Tech Line



Lori Bocklund  
Strategic Contact



Brian Hinton  
Strategic Contact

## Process ptimization COMES TO FRUITION

**Today's technology can enable value-driven change. To learn what's possible, first take a hard look at the tools you have in place.**

As we observe contact handling in centers of all sizes, shapes and locations, we hear the frustration with disconnected and manual tasks — during the contact or wrapup, and when work flows from the center to other parts of the organization. Few have made progress integrating desktop applications, automating processes or tracking work as it leaves the center.

Process change is hard. IT is busy implementing and maintaining systems and applications, leaving little time to optimize. Ideas for changes go onto wish lists or await a "future" initiative. Too often companies deploy technology with little or no plan for process change, forcing operations to "make it work" as best they can. And anyone with baggage from a past business process reengineering initiative probably has a sense of "oh no, not again" whenever suggestions of focused process improvement surface.

It's a new year, a new time, with new products and possibilities, so we need to do new and different things. Yes, Virginia, there really is an opportunity to improve processes. You can get more from your current applications or apply new capabilities. And it's not just the latest hype: There is technology available that enables value-driven change.

### Define the Opportunity

Most contact centers were not built with all the applications you would ever need, ready to scale with you. Rather, most centers were cobbled together step by step, adding applications and functions as needed to

respond to changing requirements. Two things tend to happen under these circumstances: less than ideal application integration and a recreation of the old processes with new technology. Manual processes often bridge the gaps created by integration and process shortfalls at the desktop and at the "border crossing" as work moves out of the center across the organization. It is not efficient, effective or scalable.

A customer-focused solution requires an end-to-end process view and accountability. Breaking processes into silos based on process segments, technology tools or organizational boundaries may work *for that silo*, but the end-to-end result can be inconsistent, unscalable and error-prone. And that's just the internal view. Customers suffer through unsatisfactory interactions, unmet commitments, dropped balls and communications failures that might otherwise prevent the next contact. Everyone wants to meet business goals — improve the customer experience, lower costs and/or drive revenue... but it's hard to do with the same old siloed processes.

Figure 1 shows an example for an insurance environment. Many different functions play a role in managing the overall customer relationship and experience. Yet, too often these groups operate independently and lack the tools to optimize processes. Banking, utilities, healthcare, technical support and other verticals suffer similar fates.

Because process-intensive labor constitutes the vast majority of contact costs — 67-76% according to our models (see "Cost Structure and Distribution in Today's Contact Centers," [www.strategiccontact.com](http://www.strategiccontact.com))

*Continued on page 2*

*Continued from page 1*

— we can agree that process optimization is a good thing. But why does it deserve heightened attention now? With new tools available, process redesign can be less demanding on resources than in the past. You can target the low-hanging fruit and get some early wins without completely dismantling your current environment. Also, the market focus on unified communications (UC) has the whole organization thinking about tying the contact center to the enterprise — back office, subject-matter experts, etc. — so the strategic focus is shifting to an end-to-end process view. If you are not looking for ways to improve processes, you are missing a golden opportunity. In fact, chances are you can get more efficient *while* improving service, breaking the historical tradeoff between better service and lower cost and shifting to a new paradigm where you can have it all.

### Learn What's Possible

While no one wants to put their eggs in the “hype” basket, if we sift through the marketing messages, there are some very real technology

possibilities. Understanding what's possible with technology is critical to defining process improvements. Technology acts as the great enabler and a catalyst for process change.

Part of learning what's possible is taking a hard look at what is in place, as there is a good chance it is underutilized. Contact center **routing tools** using computer telephony integration long ago enabled customer-centric routing to move a contact to the best resource based on customer relationship, account status, outstanding issues or other factors (sometimes referred to as intelligent routing or data-directed routing), but few have tapped this powerful capability to enhance processes. Multimedia routing engines can handle not just phone calls, but media such as email, text chat and fax. **Customer relationship management (CRM)** and **knowledge management (KM)** tools often have “workflow” capabilities built into them, enabling actions tied to events or outcomes that can trigger appropriate process steps. But, again, few have tapped this power, and rather have used these tools as fancy desktop interfaces. They hold the potential to impact end-to-end processes not

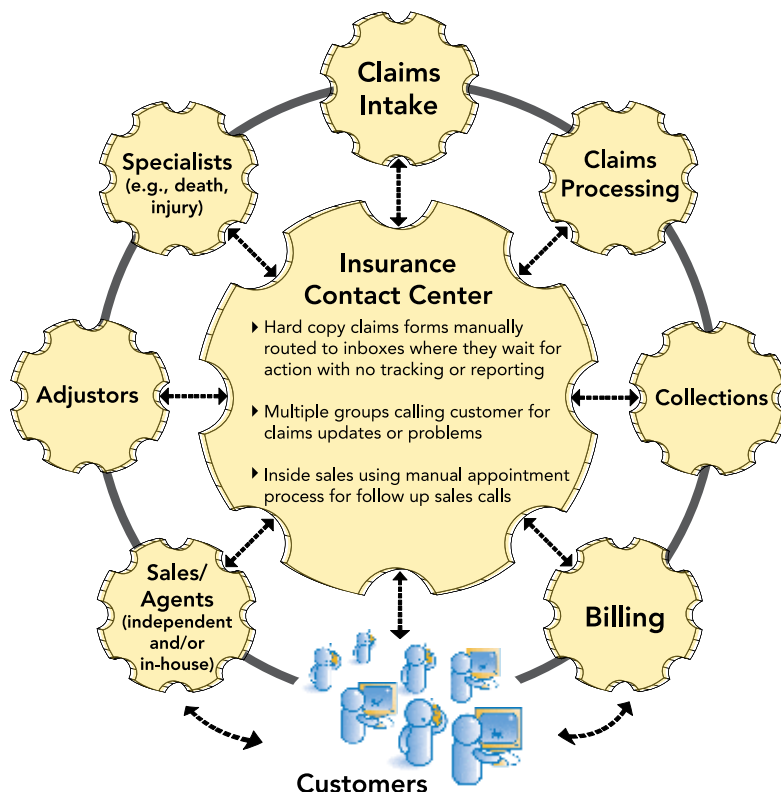
just in the contact center, but across the enterprise. It may be that your first investment is in application design with some of your in-place tools.

The “U” in **UC** is all about unifying various communication and collaboration tools. Agents can use presence and instant messaging (IM) to find available experts to help them address customer needs. They might use conferencing and shared collaboration tools to complete transactions, guide customers through Web-based activity, or even demonstrate or display information via video. All of these actions promote first-call resolution and elevate customer satisfaction.

**CEBP** is another hot technology area that is often bundled under the UC umbrella but deserves special recognition. Yes, BP stands for business processes and CE stands for communications-enabled, so the technology is enabling business process execution. For example, a customer's account or order status changes, triggering an outbound notification call. Or a CSR completes a contact with a commitment for follow up, and the CEBP tool moves the followup task onto a work queue for the appropriate group or person, complete with tracking and reminders to ensure the commitment is met. CEBP tools vary widely, some leveraging proven tools such as **IVRs**, **multimedia routing engines** and **outbound dialing capabilities**. Some CEBP solutions, such as Avaya's Communication Process Manager and Event Processor, automate the communication or information flow within a process to facilitate actions, decisions or collaboration. Others are moving into end-to-end enterprise process automation. Vendors such as Interactive Intelligence, through their Interaction Process Automation (IPA) product, and Genesys, through their intelligent Workload Distribution (iWD) product, use the foundation of their contact center routing engines to expand into automating enterprise processes through intelligent routing, monitoring and reporting on work objects other than just inbound/outbound contacts. If you have a business process management initiative in your organization, you may have access to a **business process management suite (BPMS)**. BPMS vendors, such as Pegasystems or Lombardi Software provide total enterprise process modeling, changing, monitoring, reporting, analyzing and alerting. While these vendors

*Continued on page 3*

Figure 1: Insurance is just one example of the process improvement opportunity centers face



Continued from page 2

are not traditional contact center vendors, you can certainly take advantage of their enterprise solutions. The breadth of vendors in this market shows that this concept is not just a passing fad.

**Desktop-based process analysis tools** by companies such as Knoa and **desktop application integration and process automation tools** by companies such as Open Span Technologies, Jacada and Cicero can help companies optimize desktop processes by identifying the opportunity and enabling the optimization. Performance tool vendors, such as Verint Systems and NICE Systems, also offer desktop analysis for performance optimization opportunities, including looking at back-office applications and capturing data about time spent in different tasks through desktop activity.

Business user and IT collaboration are key elements of success for today's process-oriented tools, but some recent changes are helping keep the process moving in spite of IT time constraints. Most of the technologies can be either **premise-based** or **hosted** (aka on-demand, "cloud-based" or SaaS). Companies can manage technology in-house if they have the appropriate resources and skills, or achieve new things

with less demand on IT by using a service-based model. For example, hosted solutions from companies, such as Varolii Corp. or Televox Software, may be a great answer for functions such as alerts or notification to customers. Some of the applications are also less "intrusive" to existing applications, allowing more rapid implementation and easier integration, thus further lowering IT demands. Another goal from the vendors in this marketplace is to drive more capabilities into the hands of the users, reducing the reliance on IT for process changes and enabling modeling first to determine if a change may be effective.

So the current market landscape offers quite a few good ingredients in the recipe for successful process improvement: maturing technologies, vendors and sourcing models; acquisitions bringing products together; and market changes that recognize both the high demands on the limited resources in IT and the business user needs to get more done — faster, easier and at a lower cost. The market is offering more robust capabilities with greater ease of implementation, use and optimization than it ever did before.

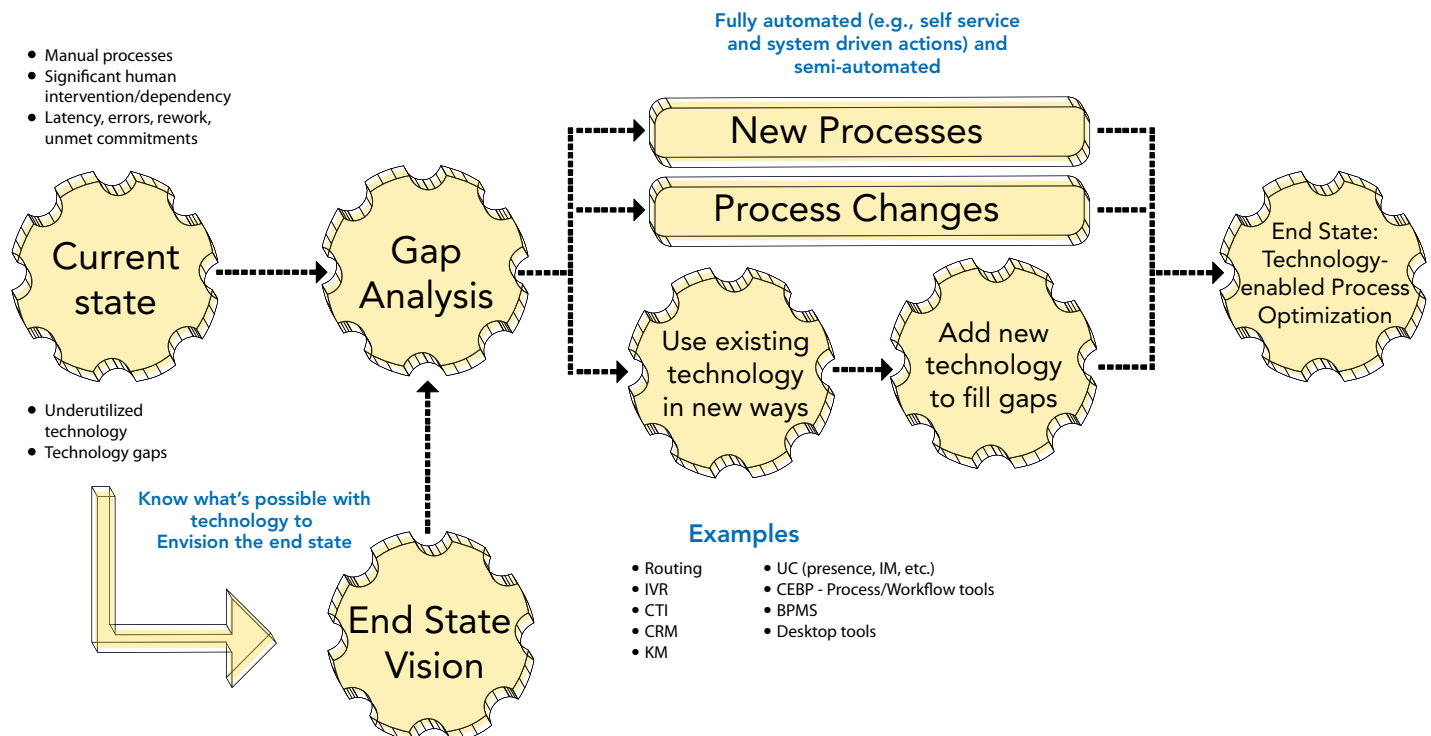
### Envision the Future

Once you understand what's possible, your next step is to envision your future. Defining your end-state is crucial to your process optimization initiative, and the knowledge of what technology can do for you fuels that vision. You have to assess your organization's readiness for process change and the amount of change you can bear. Then create a vision of the technology that will enable your path to the end state. The vision can include new things or using what you have in better ways.

Process optimization is really all about defining where you are today, where you need to be, and what will it take to get there. That last step leads to the plan, including what technology changes you will execute. But successful process change efforts focus on creating business value and measurable results — not just implementing new technology or checking items off a project plan.

As you define your future vision, you need to consider the degrees of automation and options for meeting your business needs with technology. Figure 2, shows the process of moving from the current state to the end state, based on a vision of what is possible. Many

Figure 2: With a vision of the future, technology enables process optimization



Continued on page 4

Continued from page 3

technologies can play a role in enabling process changes.

## Plan and Execute Your Process Change Initiative

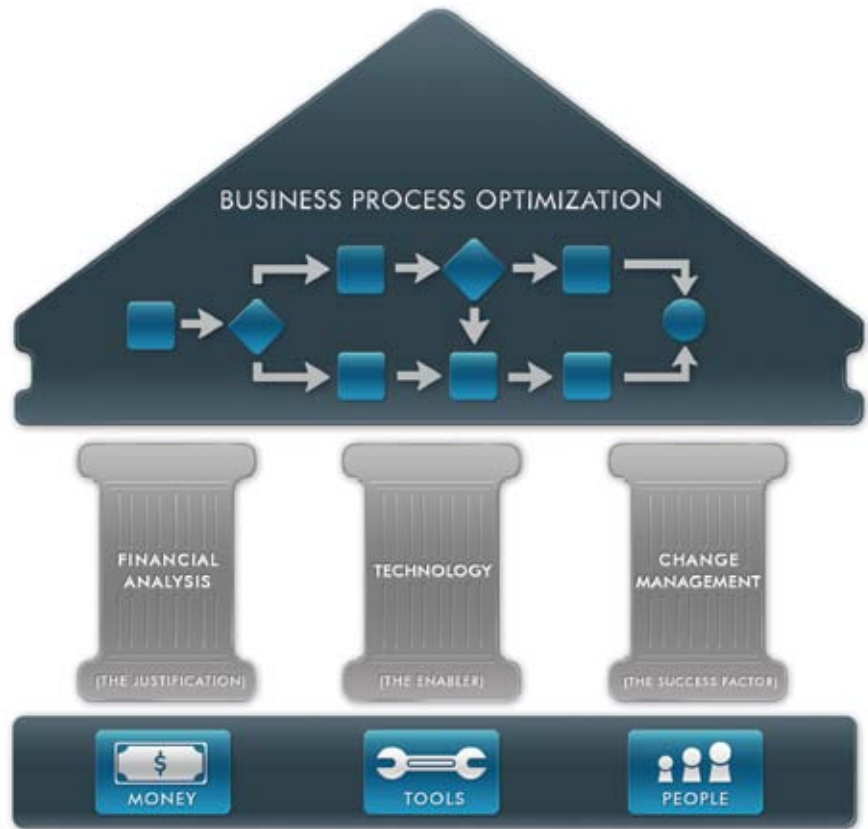
Even though the time is right, process change is challenging. You should approach the initiative with an eye to best practices starting with a clear definition of the scope of the project. Involve a crossfunctional team that can ensure an enterprise view, understand the full magnitude of the change that you are planning, assess the organization's ability to handle the change, and focus the effort by aligning the initiative with your business goals and drivers.

Once you have defined the scope, prepare your team to dedicate adequate time for research, planning, designing, securing approval and instituting process change. Take the time to understand current processes with an eye toward the end state goal. Adopt a customer perspective and assess customer impact as you define and shape new processes. That focus creates a credible value message that you'll document to gain approval for your initiative. Define the tools needed to implement the proposed change, whether that is using your current technology more effectively or implementing new tools. Finally, devise the means to measure the outcomes of the process change. Documenting and communicating success lends credibility and facilitates subsequent approval for follow-on process initiatives.

## Ensure Success through a Comprehensive Project Approach


Process change is daunting to envision, plan for, execute and achieve. You can mitigate the risk by taking advantage of exciting new tools that enable business process optimization with

Figure 3: Technology is one of three pillars in successful process optimization



high-value outcomes. However, process optimization success is not just dependent upon using technology effectively. Figure 3 shows it is one of three critical enablers. Credible financial analysis is crucial to ensure a targeted but appropriate focus. And nothing mitigates the risk of process change more effectively than

including formal change management as a part of your plan. Process change alters the way that people in your organization work; you can't neglect the "people" side of change.

Now is the time to take action on process optimization. Do it wisely, with technology as an enabler, and you will succeed. 

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

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

Brian Hinton is a Principal Consultant at *Strategic Contact*.

✉ brian@strategiccontact.com  
☎ (706) 310-0544

## ABOUT US

**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](http://www.contactcenterpipeline.com)

**pipeline**  
PUBLISHING GROUP Inc.