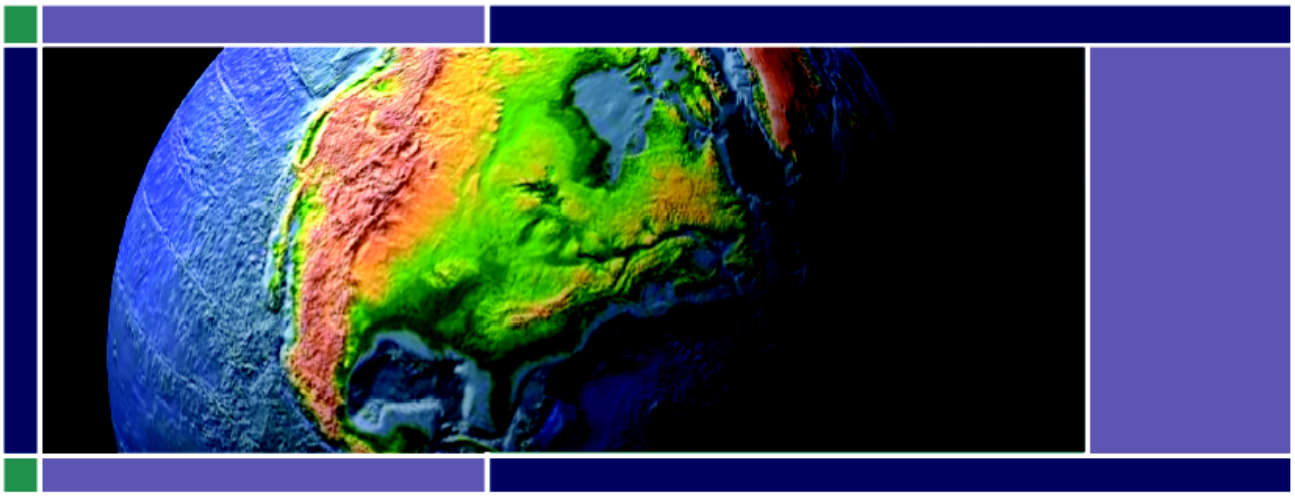

Research Report

All-in-One versus Multi-Point Contact Center Solutions

Benchmark Portal
The SOURCE for Contact Centers

Interactive Intelligence
Deliberately Innovative

Research Report

A Comparison of All-in-One versus Multi-Point Contact Center Solutions

by
Dr. Jon Anton
Adjunct Professor
Purdue University
Center for Customer-Driven Quality™

and

Bruce Belfiore
Research Director
BenchmarkPortal Inc.

with

John Chatterley
Content Editor
BenchmarkPortal Inc.

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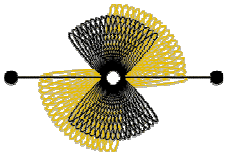

Interactive Intelligence
Deliberately Innovative

October 31, 2006

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Version 7.5.3.

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We would like to acknowledge the professionals who generously allowed us to interview them for purpose of this study.

The following gave us permission to mention them by name and company:

1. Robert Renteria and colleagues of **Bombardier Aerospace** in Wichita, Kansas
2. Robin Noma'aea and colleagues of **Harrah's** in Las Vegas, Nevada
3. Gary Johnson, Mike Campbell and colleagues of **McKesson Pharmacy Systems** in Livonia, Michigan
4. Rob Cate and colleagues of **Vegas.com** in Henderson, Nevada

The following requested anonymity as a matter of company policy:

1. a large health services call center;
2. a large health fitness call center;
3. a large internal help desk for employees of one of the "big five" accounting firms; and
4. a large e-retailing call center.

In all cases, the teams we talked with provided us with important observations that were key to the substance of this research study. Even more, for some of the professionals, we were welcomed to actually visit their centers and share their experiences, their information, their ideas and their dreams. In so doing, they provided essential insights and understanding. For this we are truly grateful.

Thank you.

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EXECUTIVE SUMMARY

Purpose of This Study

We have previously written that it takes a best practices blend of people, processes and technology to form a world class contact center (*). This Research Report documents an analytical "drill down" into an emerging model of contact center technology. We surveyed the people and explored the processes that are keys to the acquisition and implementation of technology in the contact centers. In particular we sought to understand base-line decisions made regarding a "multiple point solution" approach as opposed to an "all-in-one" contact center suite approach. In the all-in-one approach, we sought to understand the difference between on-premise and off-premise strategies. This topic is strategically important both for vendors to the industry and to contact center managers, who need to decide how to plan their way forward. Making the right decisions can have long-term consequences for budgeting, functionality, and competitiveness.

With these factors in mind, this Research Report aims to:

- Define what we mean by "all-in-one" versus "multiple-point" solutions;
- Gain insights into technology decision-making processes within contact centers (also referred to as "call centers") from specifying technology needs through implementation and operation, i.e. the Technology Process Phases;
- Evaluate results of these decisions, as recounted by implementers of both strategies. Evaluation was done both numerically (as seen through survey results) and anecdotally (as found through on-site visits);
- Highlight specific concerns regarding multi-point solutions and all-in-one solutions;
- Develop an idea of future trends in this regard; and finally,
- Conclude something about best practices that can be of use to contact center managers.

(*) See Integrating People with Process and Technology , J. Anton, N. Petouhoff, L. Schwartz; and Benchmarking at its Best, B. Belfiore and J. Anton, and Customer Relationship Management Technology, J. Anton and B. Vilsoet (The Anton Press)

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Definition of Best Practices

Since we will be using the term "best practices," we hereby define this often-used, and often-misunderstood term.

The following characteristics do not typify best practices:

1. the most common, or most popular process implementation practice; and
2. the least expensive process implementation practice.

We define best practices as follows:

"Best Practices are those defined steps that have proven to achieve the highest possible effectiveness and efficiency for a given business process."

Best practices result when highly creative managers optimize the combination of people, processes, and technology to achieve the highest possible customer satisfaction at the minimum possible cost. The last several words are absolutely key in the definition of best practices, and therefore are worth repeating here: "the highest possible customer satisfaction at the minimum possible cost." Such a definition definitely indicates a balanced optimization of quality and quantity, and/or of efficiency and effectiveness.

The concept of "benchmarking to find best practices" is described simply by the following statement:

"**All of us are smarter than any one of us.**"

What this means is that there is seldom one company that is better than all others. More typically, each world-class company is doing one or more steps really well, but is unaware of the creativity of others. Our worldwide benchmarking research helps us pinpoint the "best of the best" call centers and contact centers. We then strive to make their best practices knowledge available to all. This Research Report focuses on the best practices in acquiring, implementing, and operating contact center technology.

Summary of Research Findings

Contact center managers want ease of use and reliability in their technology, and would prefer to have one relationship, one vendor, one suite of products, and one common administrative interface. However, many are burdened with legacy "multi-point" solutions that condition their decisions, and some have long-standing relationships with point solution vendors that they want to continue. In addition, other managers need to be convinced that going with all-in-one providers will not deprive them of "best-of-breed" excellence, at least for those applications they consider mission-critical to their success.

How managers come out on this issue may have as much to do with their previous experiences, and the perceived weight of their legacy systems, as with the pure operational and financial optimization of their current or future operations.

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Conclusions: Important Distinctions Between Approaches

Our research showed many important distinctions between the two approaches. Some of the key findings from the data allow us to draw the following conclusions:

- Overall, considering all costs, including maintenance costs, establishment of vendor relationships, time required to evaluate new technology, and system administration requirements, the total cost of ownership appears significantly less for an all-in-one solution when compared with its multi-point counterpart.
- Administration is more burdensome and requires more resources for multi-point contact centers.
- Integration is sometimes simplified, and the reported ability to leverage the functionality of various applications, is enhanced with all-in-one offerings.
- The ongoing addition of most new technology, applications, and functionality, appears significantly easier for customers who have deployed an all-in-one solution versus those with multi-point products.
- As a whole, contact centers recognize the value of reducing the number of vendors they must deal with in the deployment and maintenance of contact center technology.

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INTRODUCTION TO THE RESEARCH

Technology tends to elicit one of four reactions in contact center and call center management:

- Bewilderment and dread in managers who don't really understand technology (recall that many successful contact center managers are "people persons" who have a completely non-technical background);
- Fierce loyalty in those managers who do understand technology, and who have staked their careers on specific systems;
- Envy and frustration in those managers who will never receive the budget for what they want and really need; or
- Gratitude and satisfaction in those contact center managers fortunate enough to have a system that really works for them and for their enterprise.

Within this universe of dread, loyalty, envy, frustration and gratitude, the subject of all-in-one solutions versus multi-point solutions has been a recurring topic of debate over the last few years.

Definition of Multi-Point versus All-in-One Solutions

Before heading into the debate and exploring the research, let us define what we mean by the terms multi-point and all-in-one:

1. **A multi-point solution** typically comes from a specialized vendor and satisfies a single functional need, such as PBX phone equipment, an automatic call distributor (ACD), an interactive voice response (IVR) system, a workforce management (WFM) application, and so on. In the multi-point strategy, a contact center manager must choose, pay for and implement each point solution individually; rely on costly specialists and software to integrate them together; and ultimately employ on-site expertise to singularly administer each component. Vendors offering multi-point solutions range from those who provide a specific system, such as a PBX or ACD, to those who provide a portfolio of point solution products — which are often acquired, brought under one roof and sold with integration services conveniently tagged on. As described next, it is important to distinguish the difference between a vendor's point solution portfolio and an all-in-one solution "suite."
2. **An all-in-one solution** is one in which a single vendor offers a complete suite of contact center products. Typically such technology is "born" integrated, with the components designed to seamlessly work together and provide a single point of administration. In the all-in-one strategy, a contact center manager maintains one relationship with one vendor that provides all, or most, components under one contract. The all-in-one strategy comes in two "flavors" as follows:

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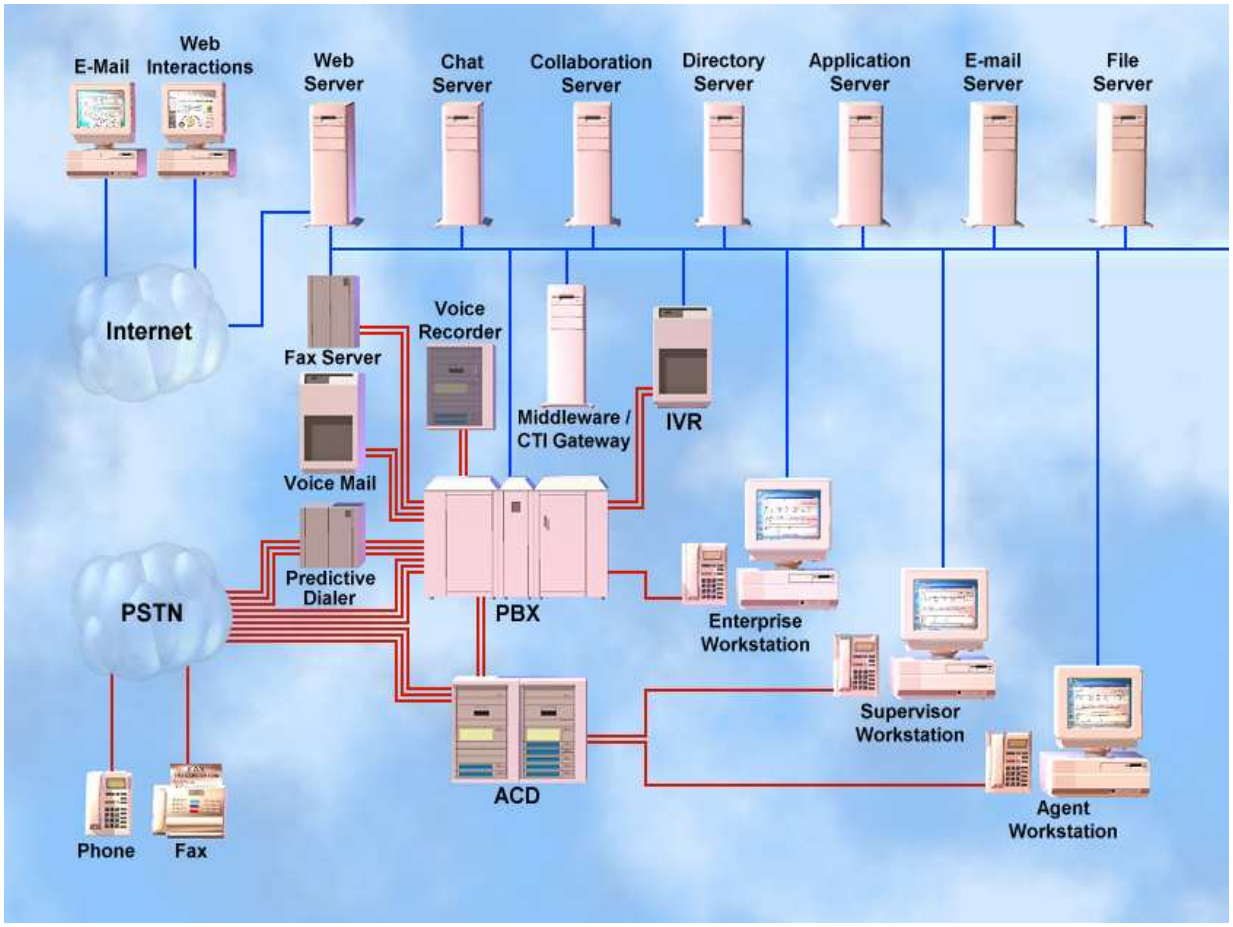
a. The all-in-one hardware/software solution can be located on-premise at the contact center with on-premise employees dedicated to operating the system. It is also possible to blend on-premise and all-in-one solutions across sites, leaving legacy investments intact.

b. Alternatively, the all-in-one hardware/software solution can be located off-premise at a third party's site, with the contact center paying only a non-recurring start-up fee, followed by a "usage" fee, i.e., pay-as-you-go. In this scenario of the all-in-one solution, there are no boxes (PBXs, ACDs, etc.) on-site, and no employees dedicated to operating them.

On a schematic graphic, a multi-point contact center solution would incorporate several different systems and multiple points of integration as well as administration, as shown here:



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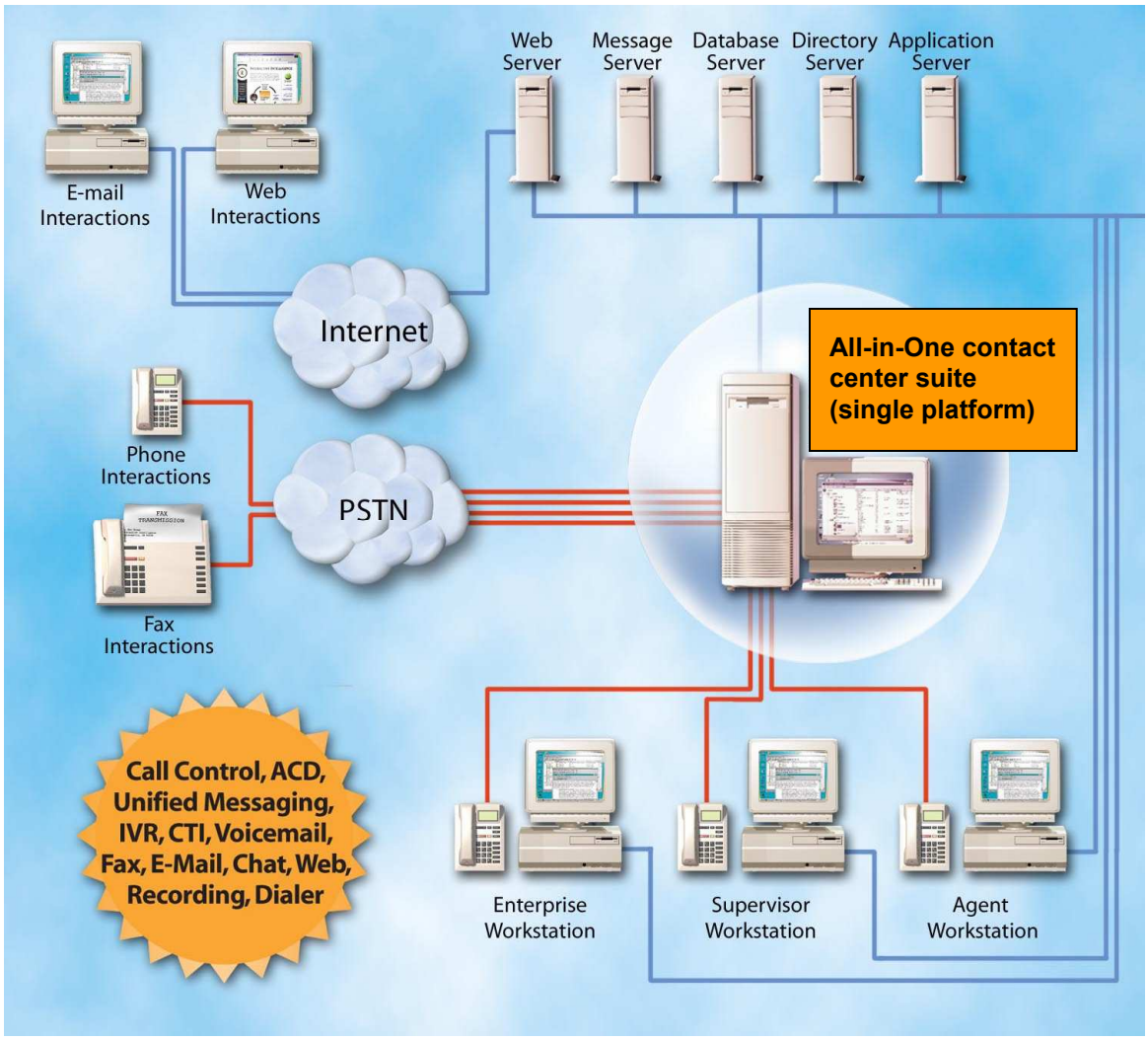
By contrast, all-in-one solutions — which use software that runs on a normal server rather than a proprietary firmware/hardware box — look more like this simplified architecture diagram:



Since on-premise all-in-one solutions are of a more recent origin, most call centers still employ the multi-point legacy solutions they've come to rely on. Only a small, but growing, percentage of call centers and contact centers currently utilize all-in-one solutions.

However, the off-premise all-in-one solution appears to be an emerging model in which the contact center has no technology on-site to worry about. The center pays only a usage fee and, as importantly, does not expend a major capital investment to get started. Conversely, this option can pose additional challenges relative to the ability to customize applications, and/or might well reduce architecture flexibility for contact center operations. Off-premise data security may also lead to legitimate concerns.

Finally, for both on-premise and off-premise all-in-one solutions, major upgrades over time are included in the periodic fees, which is not necessarily the case with maintenance costs for multi-point solutions.

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Framing the Great Debate: Multi-Point versus All-in-One

Debates regarding the efficacy and efficiency of these two models tend to center around the following points and counter-points:

- According to believers of the multi-point strategy, assembling pieces allows the contact center to choose the "best-of-breed" solution for each technology component, and thus is a superior approach. With numerous "pieces" to the CRM puzzle, no single vendor can cover them all, at least not with excellent offerings.
- Supporters of the all-in-one approach respond that much of the technology in all-in-one suites is already best-of-breed, and in other cases the functional delta between the all-in-one suite offering and the "best" multi-point offering is generally small and does not present a noticeable impact for most centers.
- On the issue of technology integration, the all-in-one supporters take a strong stance, noting the complex problems often posed by adding on new technologies from disparate vendors — and are ready to share the scars of more than one multi-point integration horror story. In essence, all-in-one supporters favor having fewer boxes and administrators to deal with. To this end, the drag & drop programming tools that many all-in-one providers offer have made it significantly easier to set up and change advanced call flows and interaction processes with no integration programming required.
- In turn, the multi-point people respond that integration has been getting easier and more predictable over the last few years with the gradual introduction of industry standards, and that most of the integration horror stories pre-date today's technical realities. Multi-point supporters also point out that recent merger activity in the industry means that certain "product suites" are, in fact, product integrations rather than organic sibling offerings. Supporters additionally note, however, that some components of large CRM suites have proven to be difficult for some to implement.
- The all-in-one supporters contend that all-in-one systems are leading the way with open standards. And until industry standards are more widespread and more meaningful for multi-point suppliers, integration of multi-point solutions will continue to present significant headaches and higher costs for contact center managers. Moreover, data that is separately configured across multiple applications will continue to make it difficult to unify systems usefully in a multi-point world.
- Regarding system upgrades, and/or enhancements and/or changes, the all-in-one supporters contend that upgrades and changes are easy, and do not require the technical skills needed to apply the impact of a change to all the boxes in a multi-point solution.
- The multi-point people respond that the current individual solutions are much more user-friendly than in the past, allowing average technical professionals to make changes with no major headaches, assuming of course that these technicians are available.

Apart from the lively debate above, our research also caused us to explore another alternative strategy, often referred to as:

1. "Hosted" all-in-one solutions; or
2. "Off-premise" all-in-one solutions; or
3. "Hosted on-demand" all-in-one solutions.

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In this Research Report we chose to focus on on-site multi-point versus on-site all-in-one solutions. In a sequel to this research, we plan to delve into the debate over on-premise all-in-one solutions versus off-premise hosted all-in-one solutions.

Key Technology Process Phases

This unique research delves into the technical issues facing the managers who have actually taken the critical decisions on these matters and are now living with those choices, to see what motivated their decisions and how they view the results. In this process, the study focuses on the various phases of the technology selection, implementation, and operation processes.

1. **Specification.** In response to a perceived need, contact center personnel research the market for a solution to satisfy that need. This requires time on the part of company personnel, and sometimes the added cost of consultants to assist in the process. The results are presented for budget approval and management questioning about the proposed solution.
2. **Vendor Selection.** This usually includes the typical RFI/RFP/contract negotiation processes. As with the Specification phase, vendor selection requires time from company personnel and possibly outside consultants and attorneys.
3. **Installation.** This phase includes the integration of hardware and software as required. Installation can involve separate boxes for each solution as well as administrator training, plus, of course, system integration.
4. **Transition.** Transition is the critical phase in which the old system is phased out, the new system is brought up, and bugs in the integration emerge and are worked out. This phase also involves the training of personnel, and high-tech talent.
5. **Operation and Upgrades.** The keys here are functionality, efficiency, reliability and ongoing costs. The ability to keep a solution useful and cutting-edge depends on the continued survival of the vendor (not a small consideration, given the history of the past decade), system administration and maintenance, and the hassle and costs of installing upgrades as required.

We will keep these Technology Process Phases in mind as we proceed through the study.

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Methodology

The study had the following components:

1. Screening Questionnaire

A screening questionnaire was sent to call center and contact center managers in the Center for Customer-Driven Quality database, which includes over 35,000 names. This questionnaire asked basic "framing" questions about the call center and inquired whether the person had awareness of, and ideas about, all-in-one solutions versus multi-point solutions.

From the centers that responded, approximately 240 were identified as having the following parameters, which were considered useful for this study:

- **Size:** having a minimum of 50 agents; and
- **Technology:** possessing four or more of the major technologies indicated in the survey.

This screening of possible participants was applied in order to narrow the focus to operations of a certain sophistication and substance in terms of technology. Naturally, it resulted in a somewhat larger-sized, and more technologically endowed, group of respondents than the sector as a whole, as is indicted in the Profile section that follows.

2. In-depth Survey

The in-depth survey (Appendix A) delves into the nature of the decision process made in these companies. The aim was to garner at least 50 returns from the identified companies, a goal that was met.

Also, some additional cuts were made of the data, which showed responses according to the following parameters:

a. Those that have a multi-point solution installed;
b. Those that have an all-in-one solution installed; and
c. Those with an all-in-one solution that is augmented by legacy systems and add-ons.

3. On-site Visits

Visits were made on site to five call centers and contact centers across the United States. The centers were chosen because they represent widely varying approaches to the technology questions at the heart of this study:

1. One call center is a complete, all-in-one "soft switch" shop (i.e., with a software-based ACD that runs on a server, rather than a dedicated hardware ACD box);
2. One center utilizes a soft switch with all-in-one capabilities; however, the switch has been layered with multiple legacy systems due, in part, to a recent merger;

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3. A third center leverages an all-in-one provider, which it utilizes only for some of its required solutions;
4. One center aligns with a hard switch provider that it currently looks to for most of its technology needs, and considers that vendor an all-in-one provider even though the vendor's solutions are actually integrated by the provider; and
5. The fifth center represents a complete multi-point solution approach.

Overall this group allowed us to drill down on practical aspects of all-in-one versus multiple point decision making and operations, providing richness of detail and depth to the study.

First we will review the profile of the centers that took the survey, then see how they responded on the central questions of this research.

4. Survey Results and Analysis

The survey responses by contact center management respondents were tabulated for each question, and then analyzed to develop the averaged answers reported in Appendix B.

It must be noted that some respondents omitted an answer response to individual questions. Therefore, in interpreting the averaged results to each question we tabulated the sum of all responses to each question, and used the totaled sum to calculate the averaged survey response to questions with a single answer, and to calculate the percentage distribution for answers to multiple-choice questions.

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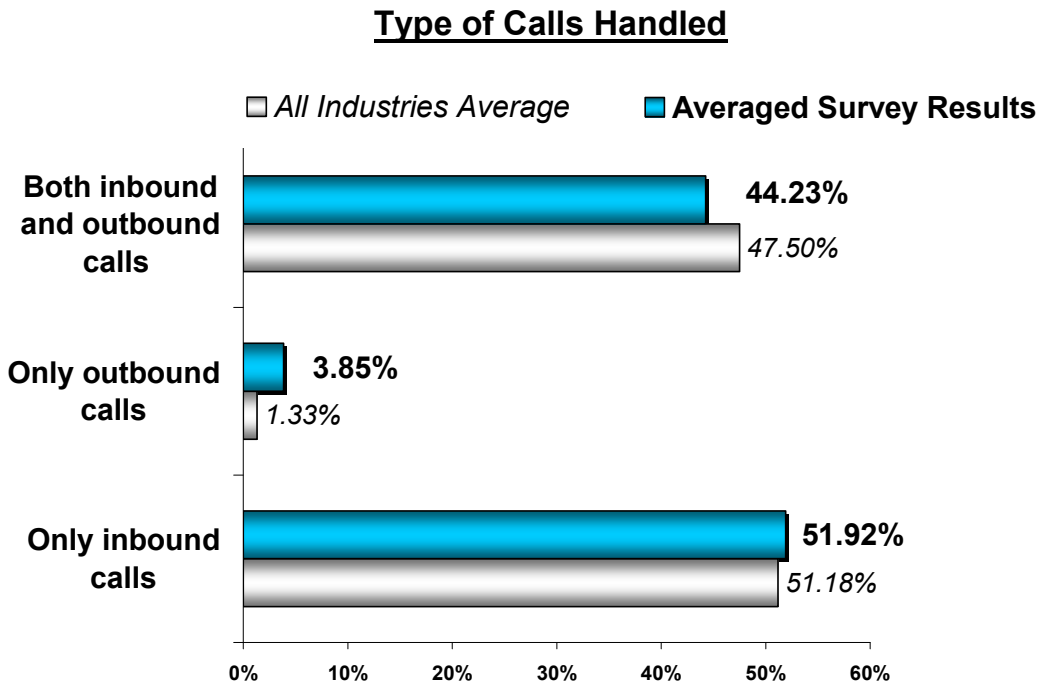
RESULTS OF THE SURVEY RESEARCH AND INTERPRETATION

General Profile of the Companies Surveyed

The Companies surveyed have the following general characteristics:

Type of Calls



The survey sample tracks closely with the averages for the call center industry as a whole.

The "All Industries Average" for the graphs in this study comes from the BenchmarkPortal-Center for Customer-Driven Quality™ (Purdue University) database, the world's largest repository of contact center performance metrics.

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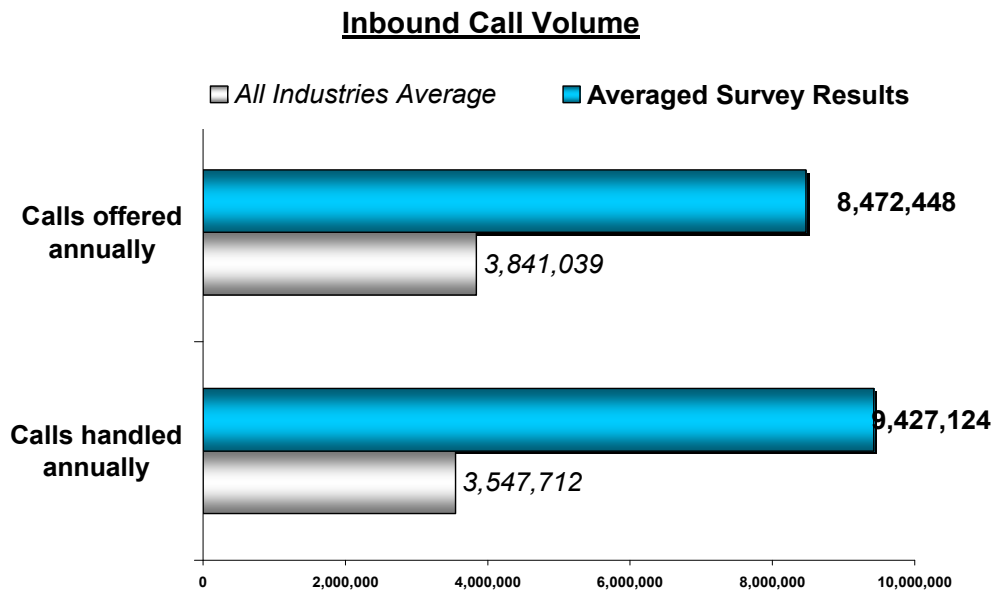
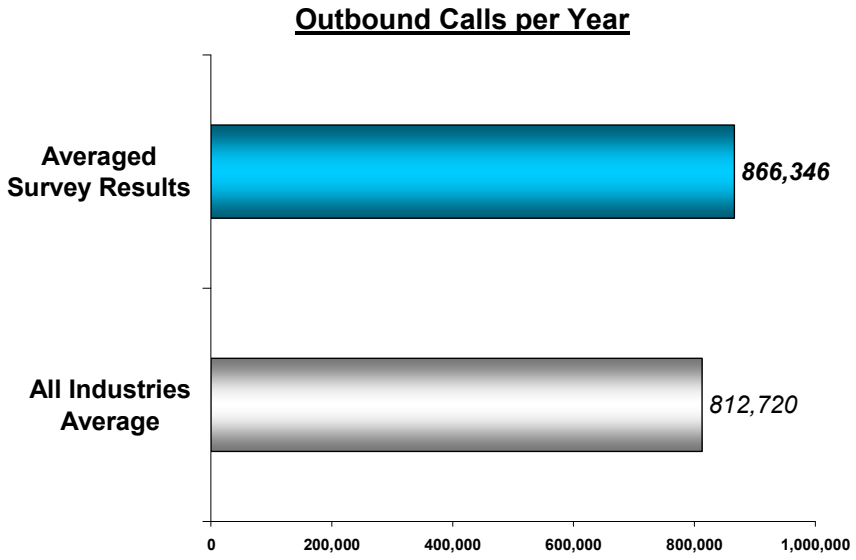
Volume of Calls



The sample has, on average, significantly larger inbound volume than the average for the call center industry. This was expected due to the fact that the sample was screened to eliminate very small centers and those with little technology.

However, the outbound volume is very similar on average:



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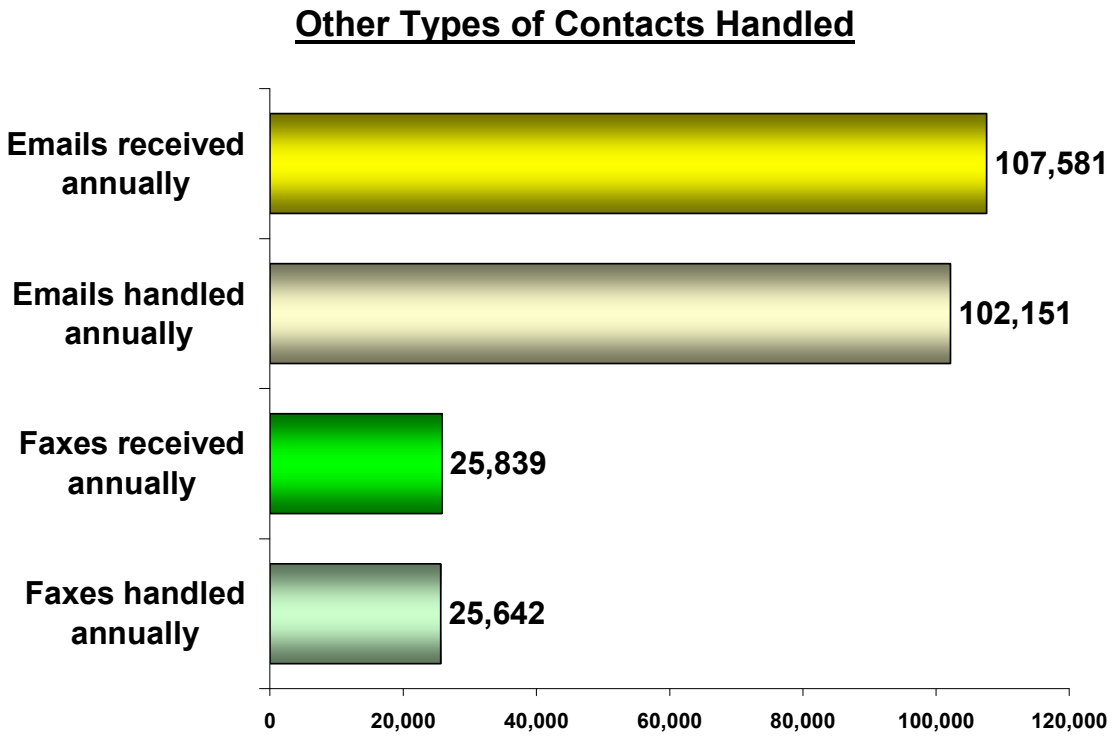
Volume of Emails and Faxes



These channels are much less important than voice on a volume basis. However, best practices require the attentive consideration of every channel chosen by the customer to communicate with the enterprise.

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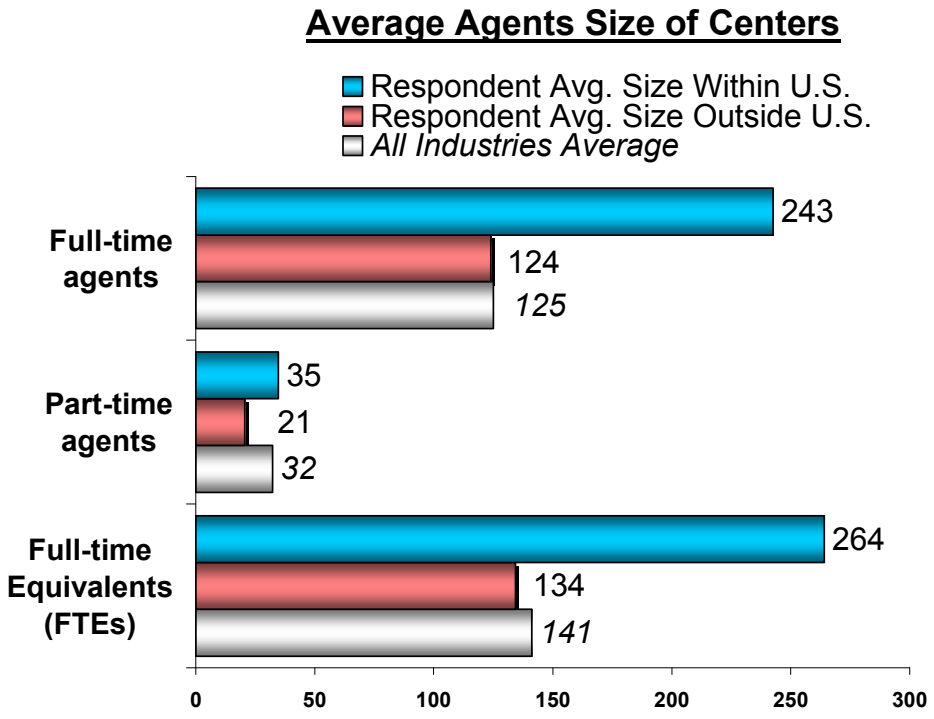
Size of Respondent Centers (Agents)



The selected survey sample is somewhat larger in terms of staffing than the average for the industry as a whole. Again, this was expected due to the screening process.

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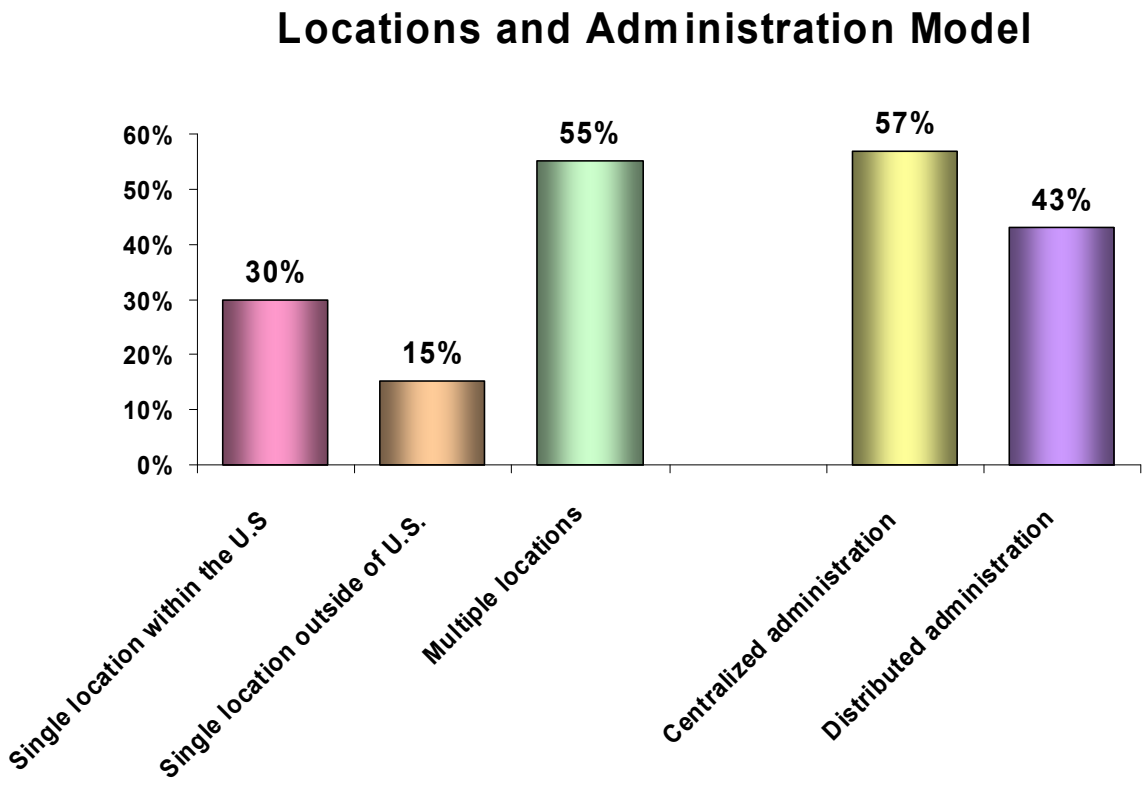
Location of Centers



The survey sample has a good distribution of centers both in the U.S. and outside the U.S. This gives a significant international component to this study, which the researchers desired. Most centers in the survey are part of multiple-site operations, which we would expect given the average size of these centers.

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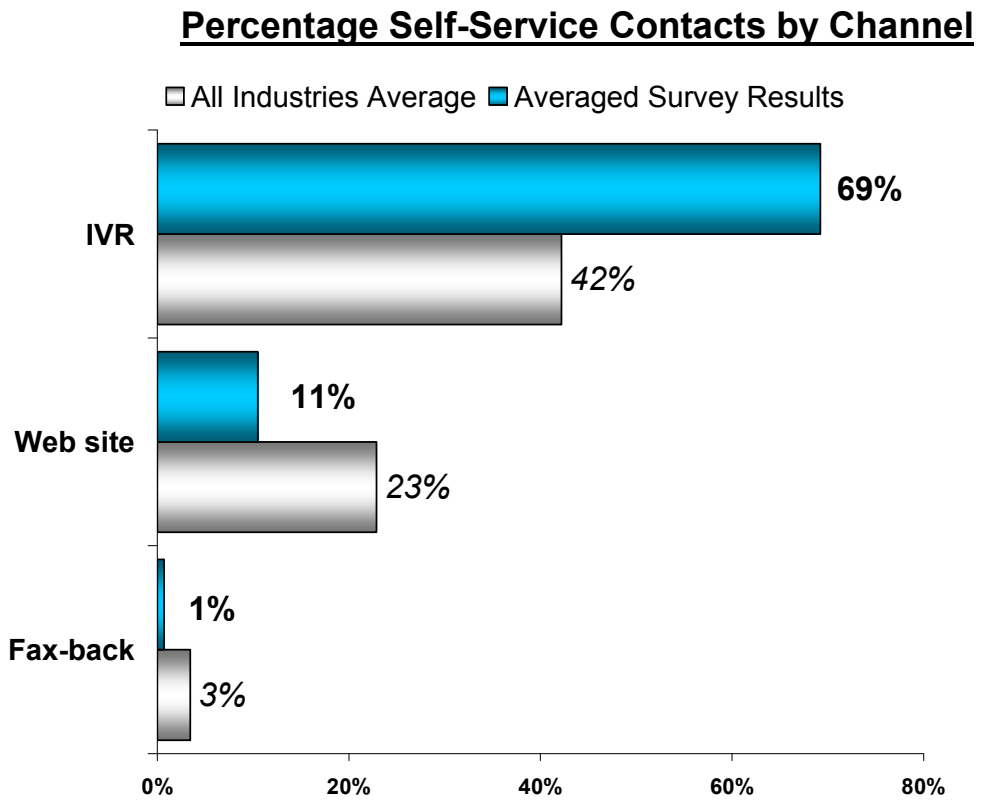
Volume Handled by Self-Service



Our sample centers are somewhat more automated than the averages for the industry in terms of IVR, though not in terms of Web site self-service or fax-back.

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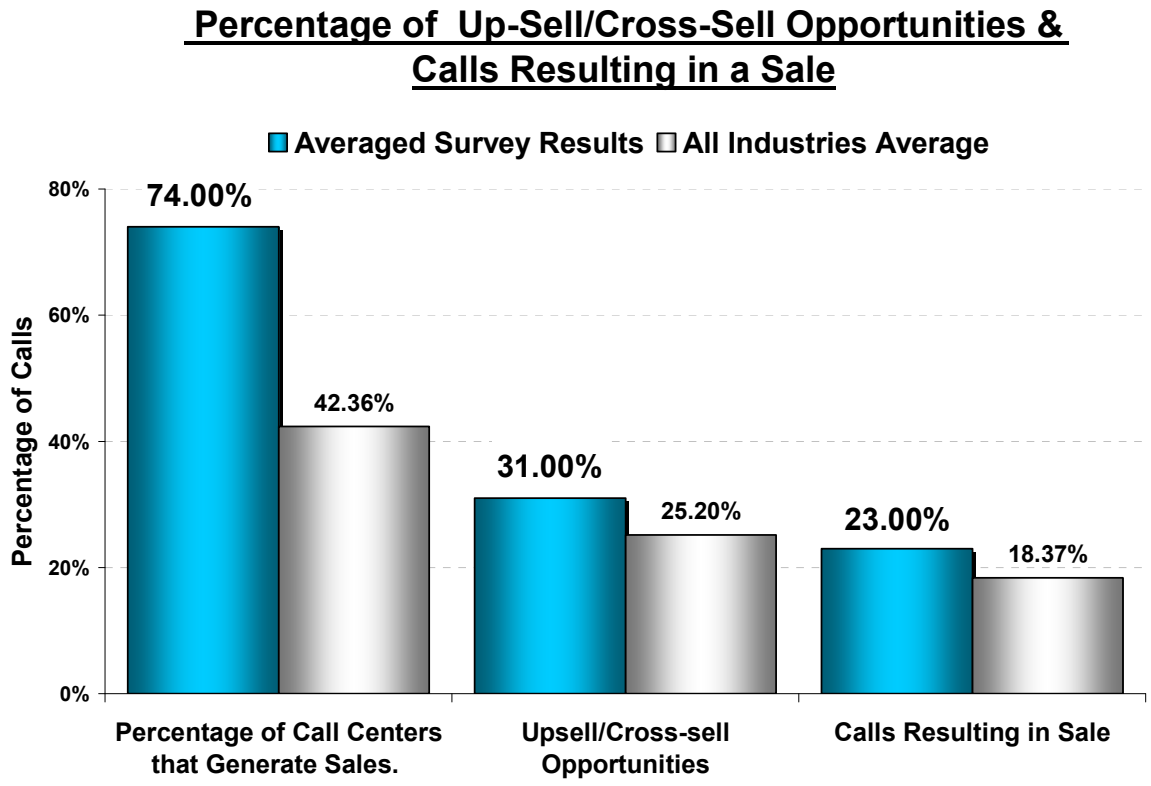
Up-sell/Cross-sell Opportunities Resulting in a Sale



Three quarters of the centers in our sample generate revenue, and many calls also give rise to successful up-sell and cross-sell results. These centers therefore are not pure "cost centers," and can lay an easier claim to budget for needed technology than the majority of centers in the call center sector that do not generate sales.

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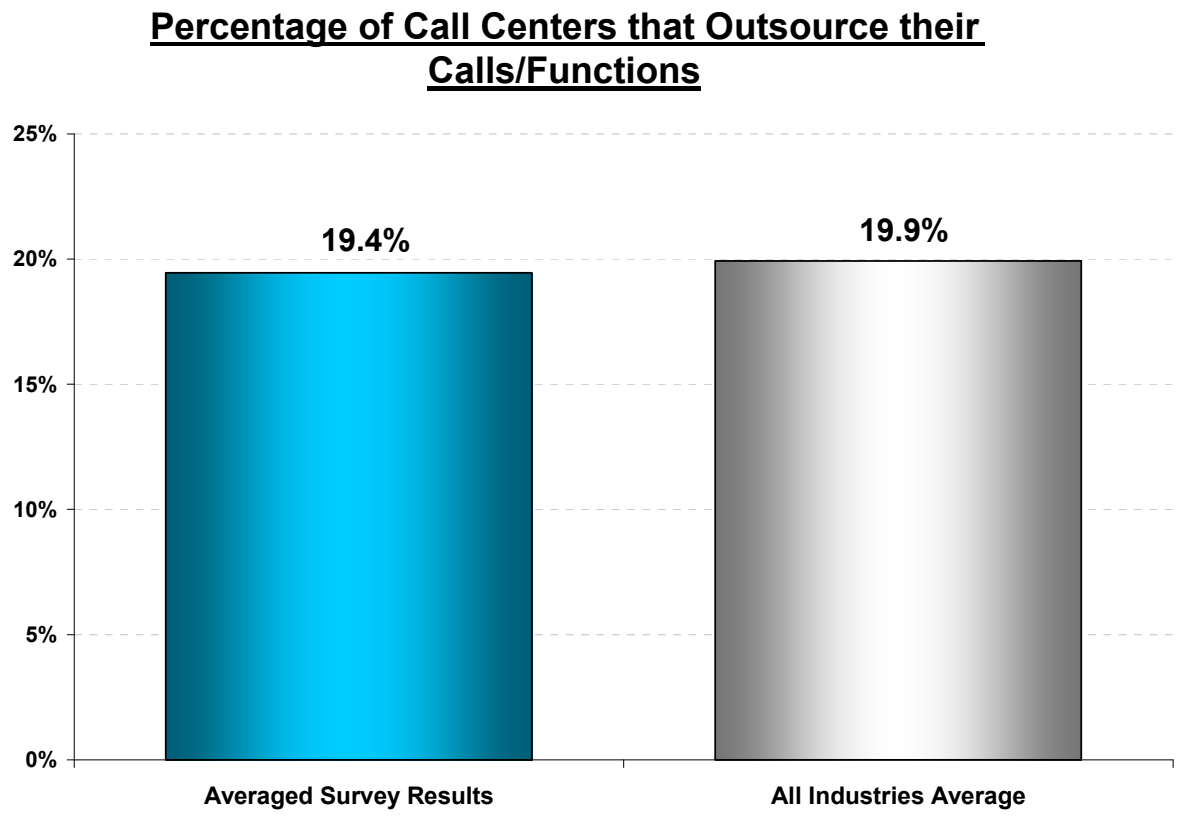

Only 1 of 5 centers outsources some of their contacts, which exactly mirrors the overall industry figures.

General Profile Summary

We can summarize this overview of the survey sample in the following manner:

- The participating centers, while larger than average, have similar general call types as the sector as a whole;
- Voice still dominates contact channels, though email is a significant channel as well;
- The sample leads the industry somewhat in terms of self-service IVR automation, but does not lead with regard to the web channel;
- The location of these centers represent a good mix of centers both inside and outside the U.S.;
- Three quarters of these centers generate sales revenues for their enterprises; and
- Most of the centers handle their contacts in-house.

We can thus conclude that, in terms of their basic characteristics, these respondents represent a good sampling for purposes of this study. They mirror the sector as a whole in many respects, while being somewhat larger; are more likely to contribute revenues to their enterprises; and, overall, are more technologically endowed, especially for the voice channel,

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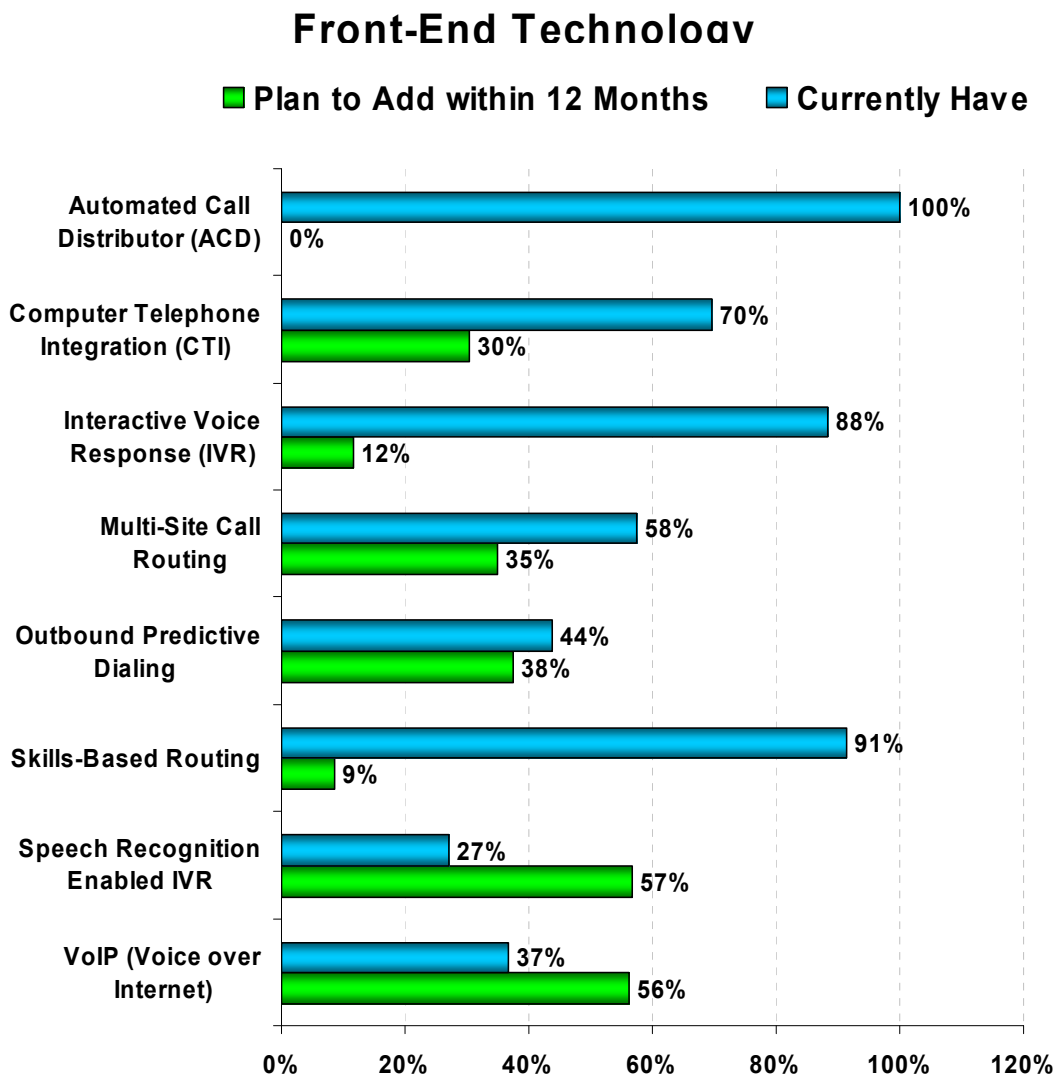
less so for the Web channels. The next section discusses in more detail the technology implemented and used by the sample call centers.

Technology Profile of the Participants

The following charts show the technology currently possessed by the participating centers, as well as the technology they are currently planning to add within a year.



All participants in this study incorporate an ACD, a minimum requirement to be considered a call center. Access to the ACD comes via telephone lines for nearly two-thirds of the centers, but a noteworthy 56% say they plan to add VoIP capabilities within a year. Almost 9 out of 10 participants already have an IVR, with the rest planning on adding one within a year. Speech recognition, while utilized by only one quarter of the sample, is on the wish list for 57% of the respondents. Also, more than 90% of survey respondents currently employ skills-based routing, with the remaining centers planning to add it within a year.

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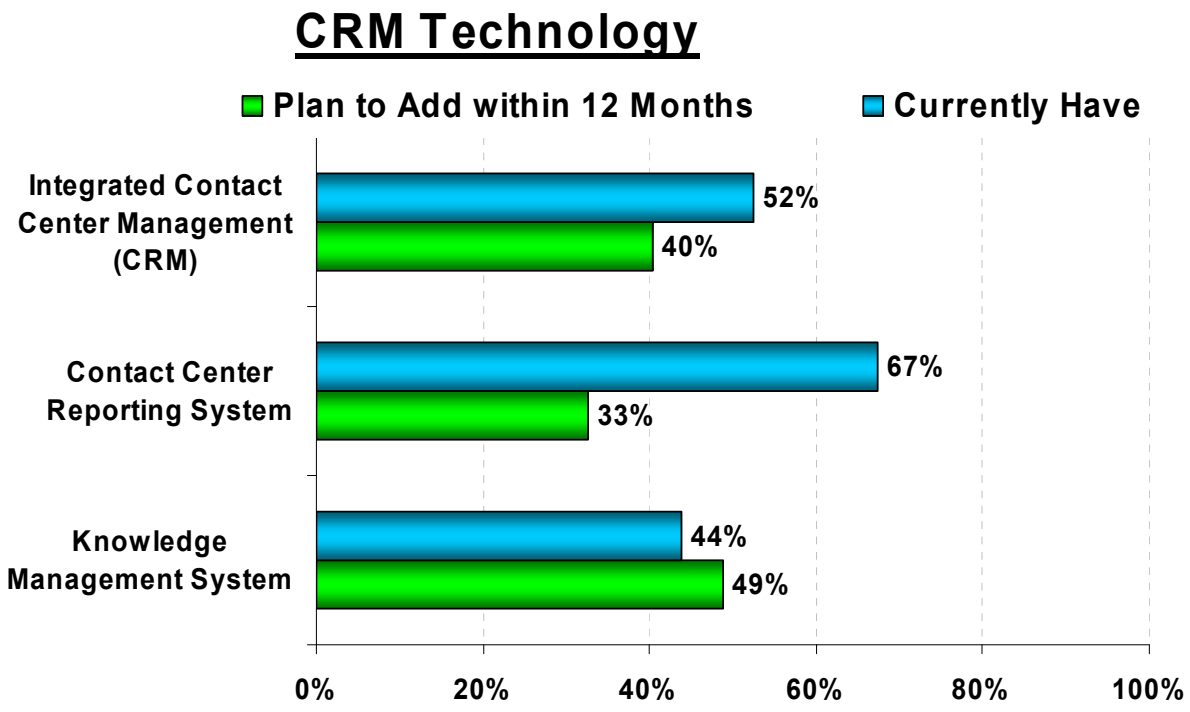
CRM Technology



Survey respondents were evenly split between those who currently have a CRM package and those who do not. Among those who do not, it is a highly felt need for the coming year. An even two-thirds of respondents utilize contact center reporting systems, and the remaining one-third are planning to acquire a reporting system this year. Knowledge management systems, while installed in less than half of the centers currently, attract nearly half of the respondents as something they would like to install within a year.

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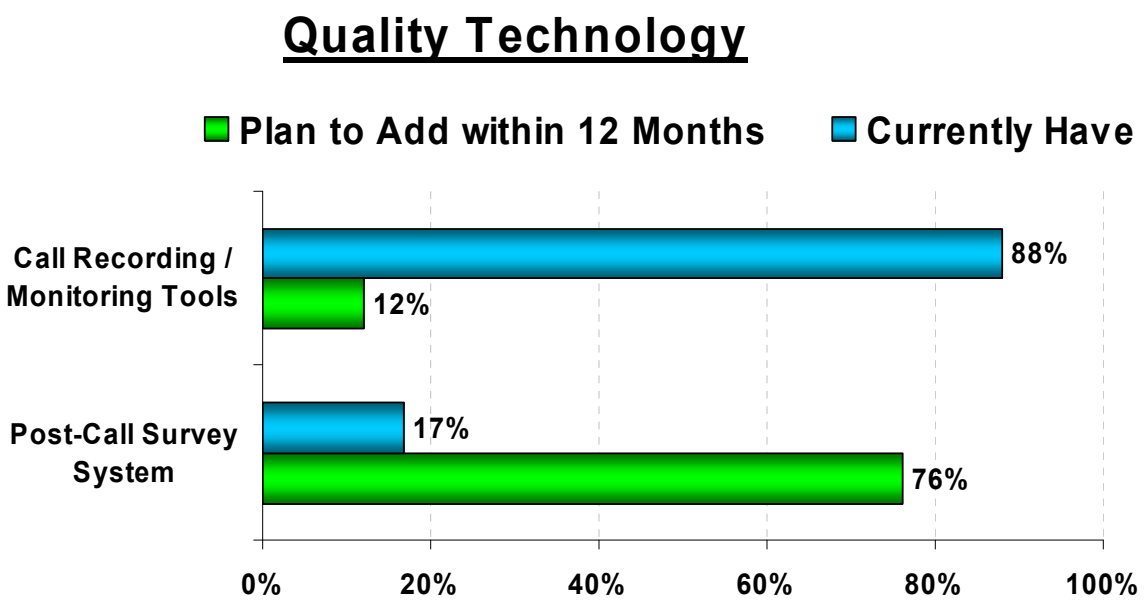
Quality Technology



Among respondents for the study, 88% have call recording or monitoring tools, and the remaining 12% say they will add this capability during the next 12 months. At the same time, only 17% of respondents currently employ post-call survey systems. However, this "instant feedback" is clearly seen as desirable and needed by most of the rest: a robust three-quarters of the respondents said they were planning to add this customer feedback capability to their centers within a year.

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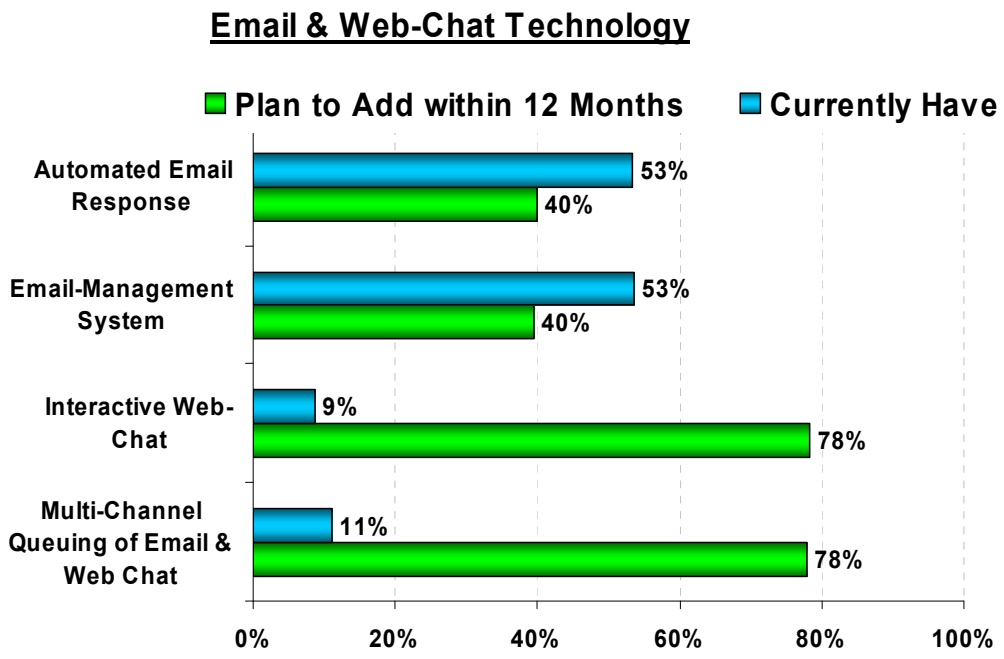
Email & Web Chat Technology



Automated email response and email management systems track each other completely; approximately one-half of survey respondents possess these systems, and most of the rest are planning to add them. On the other hand, interactive web chat and multi-channel queuing for email and web chat also track each other closely, with only roughly 1 in 10 centers currently enabled.

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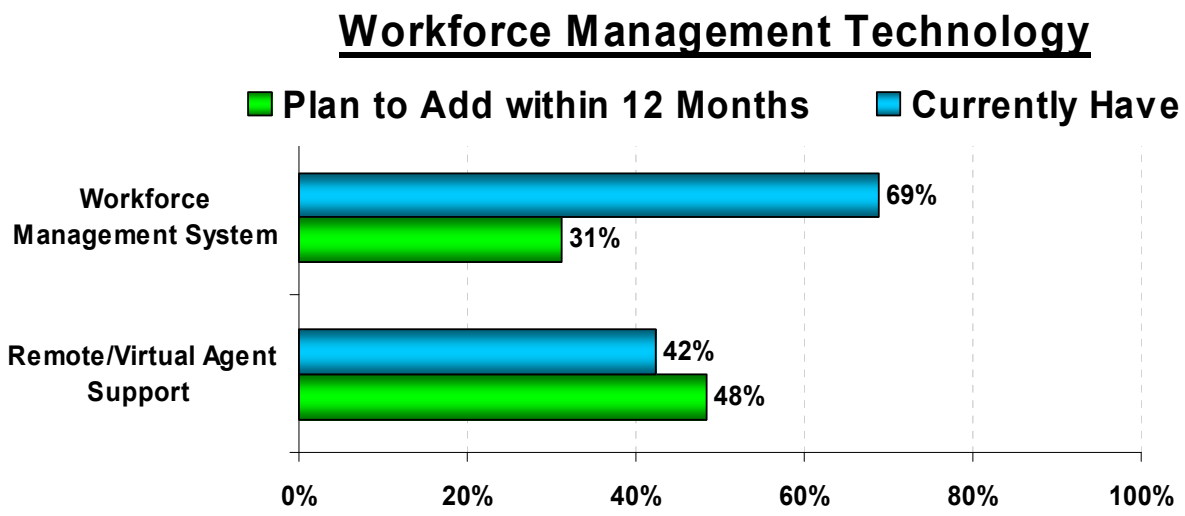
Workforce Management Technology



Workforce management has been recognized as a key functional technology that results in greatly improved agent scheduling and often has high ROIs attached to it. Almost 7 in 10 centers already leverage workforce management technology, with the rest reporting that they plan to add it within the next 12 months.

Regarding remote/virtual agent support, fewer than half of the centers surveyed currently maintain remote/virtual agent capabilities. However, almost half indicated that they wish to add such capabilities.

The on-site visit to a complete all-in-one solution call center revealed that the center was piloting a work-from-home option with six experienced agents. The manager stated that the system was all IP-based. Once the employee had a computer, a headset and an Internet connection, they were off and running. The manager additionally noted that he already had a call center "without phones," and that he might soon have a call center "without people (physically) in the office." His company, which is growing in other areas, is happy with the call center manager's plans to recover space for the enterprise, while maintaining high sales results and quality standards.

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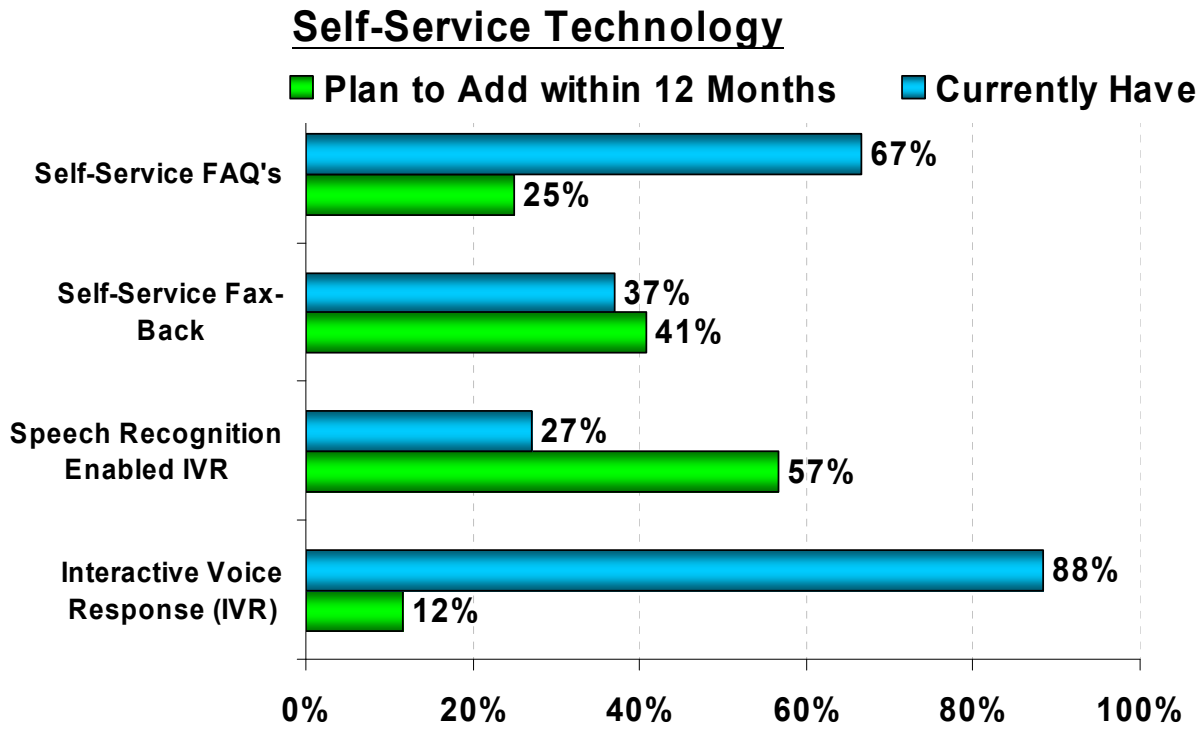
Self-Service Technology



Self-service FAQs are currently utilized by two-thirds of the participant centers. The figure is closer to one-third for self-service fax-back. It should be recognized that self-service can stretch to cover certain functionalities of IVR and automated email response as well.

CRM
Quality
Email & Web Chat
Workforce Management
Self-Service

Conclusion: Additional Technology Needed

The conclusion we can reach from this data is that our sample has a good mix of technology, but, on average still needs and wants considerably more. It is a sample actively looking at technology currently (high percentage of "planning to add"), which makes it good for purposes of this research. More on this follows.

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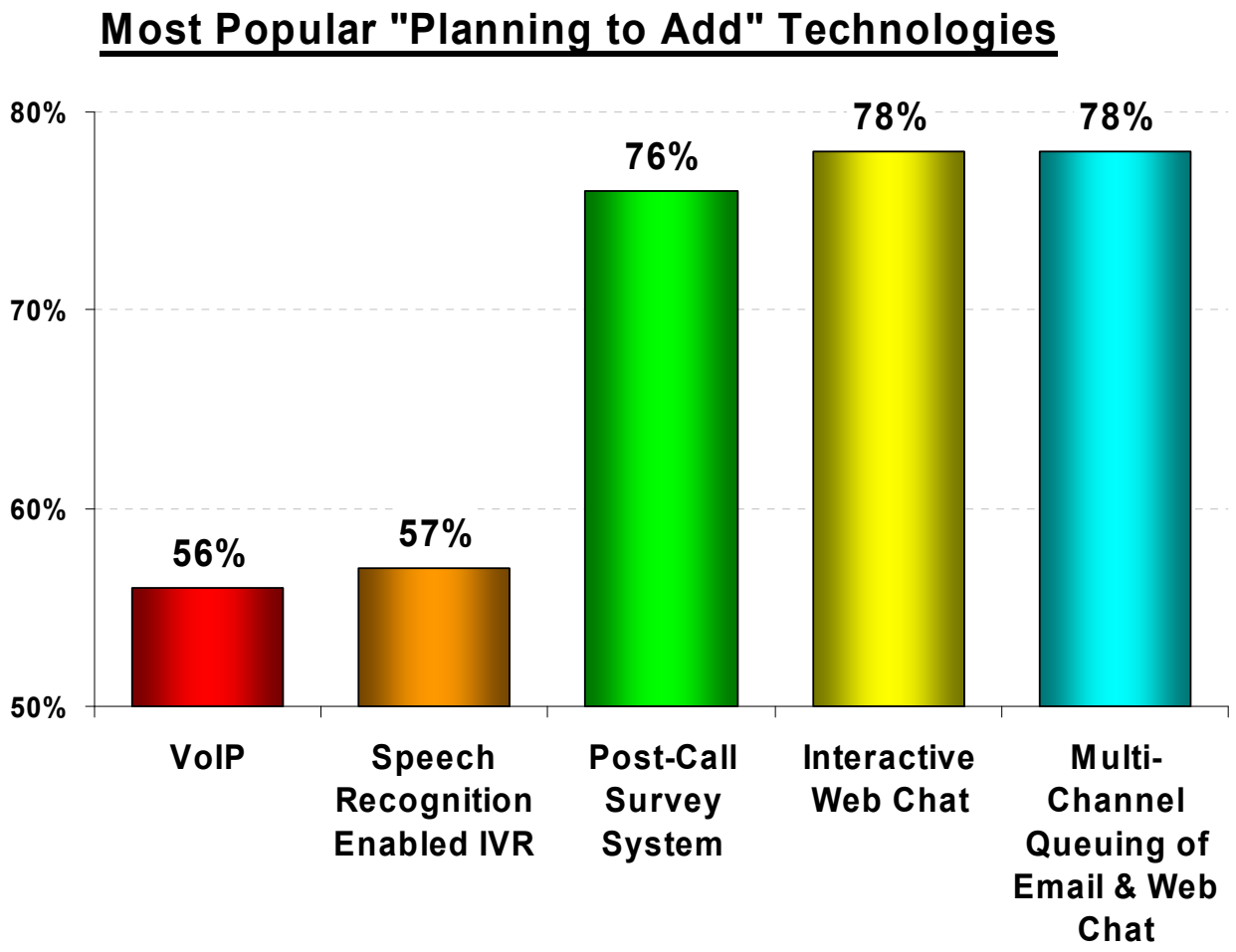
Planned Technological Expansion and Capacity

The survey revealed that there is a major demand for new technology in the contact center space. The most popular "planning to add" technologies were the following:

Most Popular Planned Technologies



Large wish lists were common to many respondents. Two web-related technologies and the multi-channel queuing of email and web chat topped the list along with interactive web chat, and seemed to be a forward-looking desire more than a currently felt "must have", judging by the site visits.

The post-call survey system, on the other hand, was an urgently felt need, as it deals with current operations and is a point of intersection for judging people, processes and technology together, from the customer's point of view. In fact, the post-call survey system item sparked the greatest discussion and inquiry into best practices during the on-site visits, as contact center managers grappled to understand what the best, most cost-effective way was to determine customer satisfaction and to relate the results to their agent performance.

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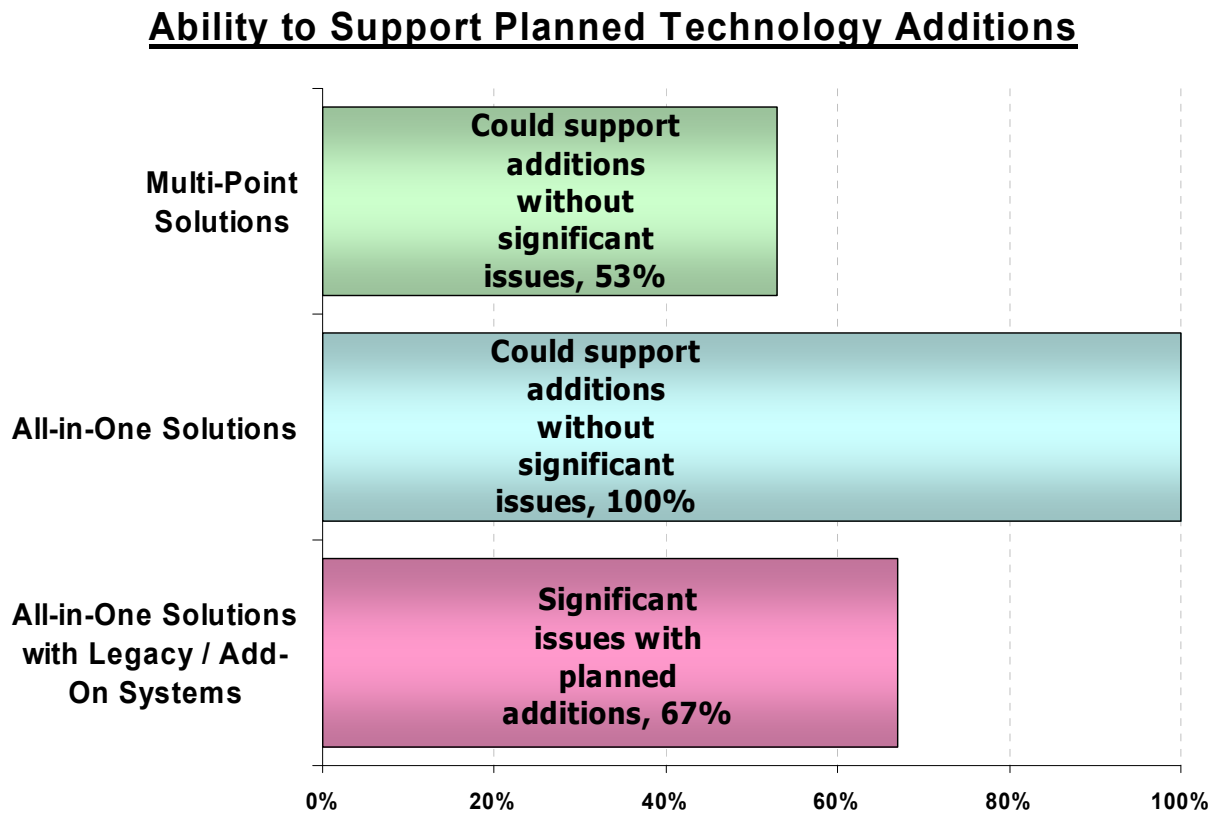
Interestingly enough, the technologies that have the highest "need to get" factor also rated the lowest marks for ease of integration and effectiveness, from multi-point as well as all-in-one centers. This would indicate that managers have tried these solutions and have not been satisfied with them. Consequently, this would seem to represent major opportunities for vendors of all types.

That stated, the on-site visits provided a useful reality check with regard to column 2 of Survey Question 1 (plans to add technology within 12 months). In several cases, questioning revealed that, while the new technology had in fact been discussed and/or requested in the budget, the actual probability of funding and implementation was less than certain. This observation is important and not surprising, given the large number of initiatives that would come out of the "planning to add within a year" column. This finding also notwithstanding, the results are testament to the fact that new technology is seen as key to call center and contact center operations and their competitive performance going forward.

Challenges to Adding Technology to Current System

When asked: "Will your current system support planned additions without significant modification or integration issues," 50% said "Yes," while 50% responded "No."



When the data were cut according to the system type of the respondents, the following insights emerged:

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- 53% of contact center survey respondents with multi-point solutions indicated that their system could support planned additions without significant issues;
- 100% of those with all-in-one solutions said their system could support planned additions without significant issues; but
- On the other hand, 67% of centers that leveraged a core all-in-one solution weighed down by legacy or add-on systems said they would have significant issues with planned additions.

While centers with pure all-in-one solutions indicate the easiest path to adding on new functionalities, those with all-in-one solutions currently supplemented by add-on solutions report the hardest time dealing with integration.

To the contrary, the on-site visits indicated that the biggest single challenge contact center managers perceive is financial rather than technical. Some would prefer to migrate entirely to all-in-one solutions, but do not feel they can get the necessary budgetary approvals. Others felt that with adequate funding, the integration issues of multi-point systems could be readily overcome.

Planned Technological Expansion and Capacity
Most Popular Planned Technologies
Challenges to Adding Technology to Current System

Conclusion: Easier Adds via All-in-One Solution

A key conclusion from this part of the study is that the ongoing addition of new technology, applications, and functionality is significantly easier for customers who have deployed an all-in-one solution versus those with multi-point products.

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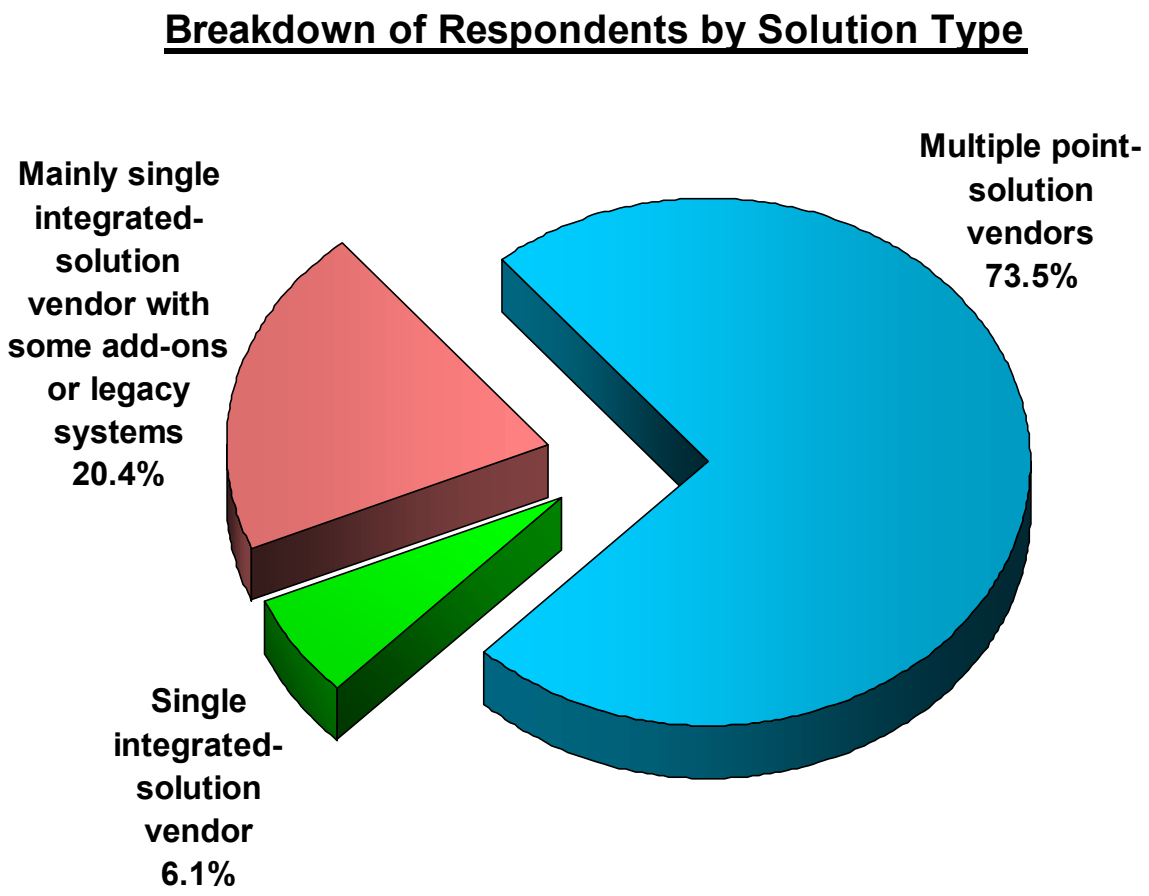
All-in-One vs. Multi-Point Installed Solutions

The breakdown of respondents according to solution type is as follows:



These results appear reflective of the industry as a whole. The all-in-one solutions have only been available for 10 years, and have more recently begun to gain significant market share.

Attitudes toward all-in-one platforms seem to reflect mental starting points in the search process, as well as findings on functionality. Consider the following responses, with the first coming from those survey respondents who purchased multi-point solutions:

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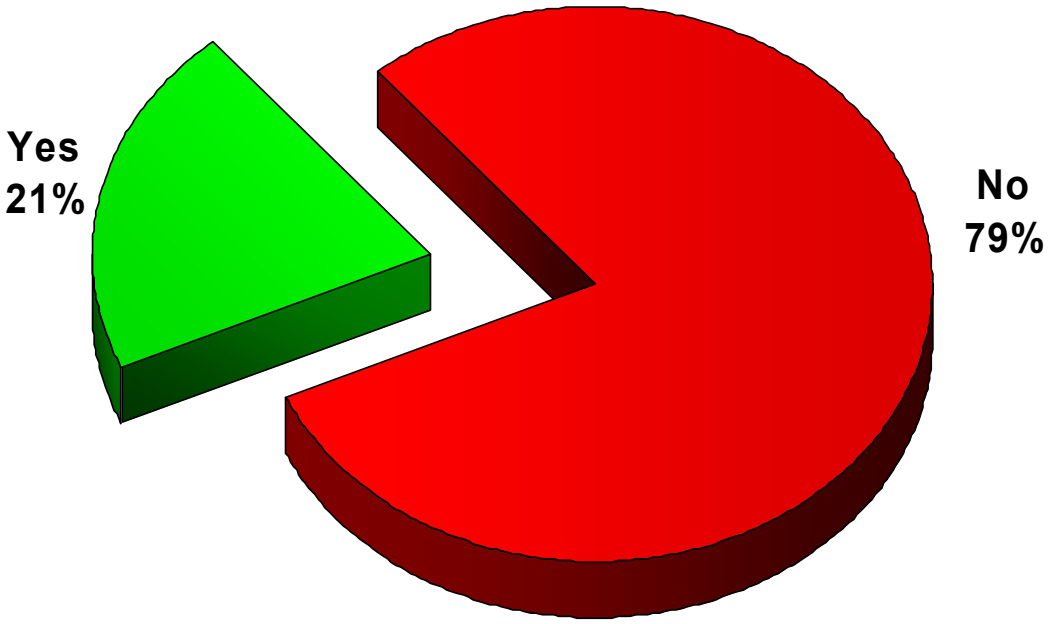
Did you consider purchasing an all-in-one platform versus the functionally specific point solutions that you purchased?



Thus, only 1 in 5 of those call center and contact center managers who purchased a multi-point solution even considered an all-in-one solution. Reasons given for this approach included the following text comments:

- IT requirements overrode the business requirements;
- Anticipated difficulty in adapting legacy systems to all-in-one solutions at the time respondents were shopping;
- Lack of availability of such all-in-one system in the market (at the time we were looking); and
- Multi-point provided best functionality at the time respondents were shopping for it.

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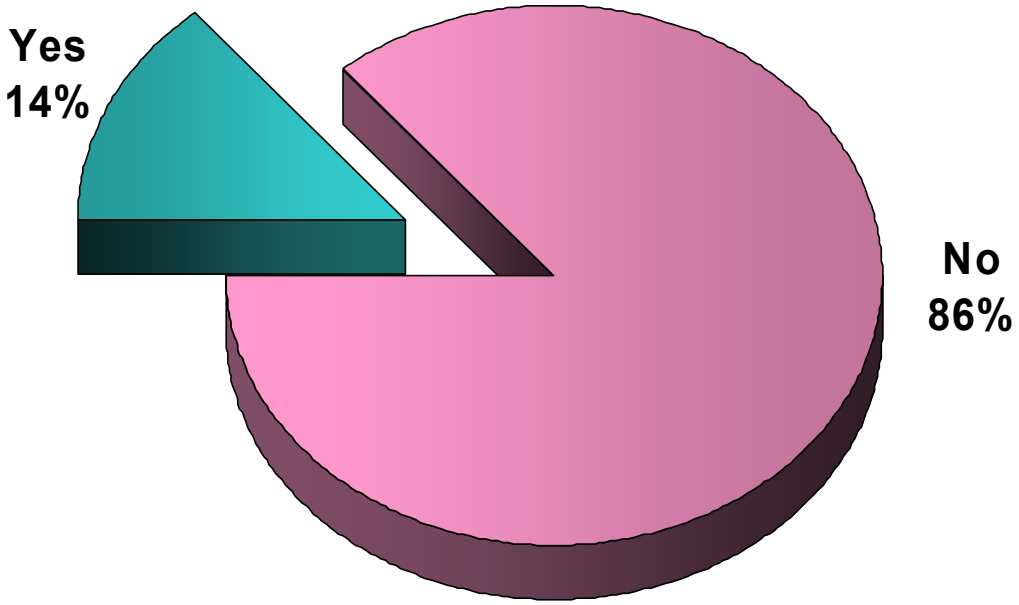
The following information was obtained from managers who purchased an all-in-one platform:

Did you consider purchasing functionally specific point solutions vs. the all-in-one platform for the systems that you purchased?



As indicated here, 86% of the contact center and call center managers who purchased an all-in-one solution did not even consider a multi-point solution. The reasons they gave included the following text comments:

- Easier to administer, and to adapt to change;
- Support is easier and less costly;
- We trust the solutions provider based on long-term relationship; and
- No better single-point solutions available.

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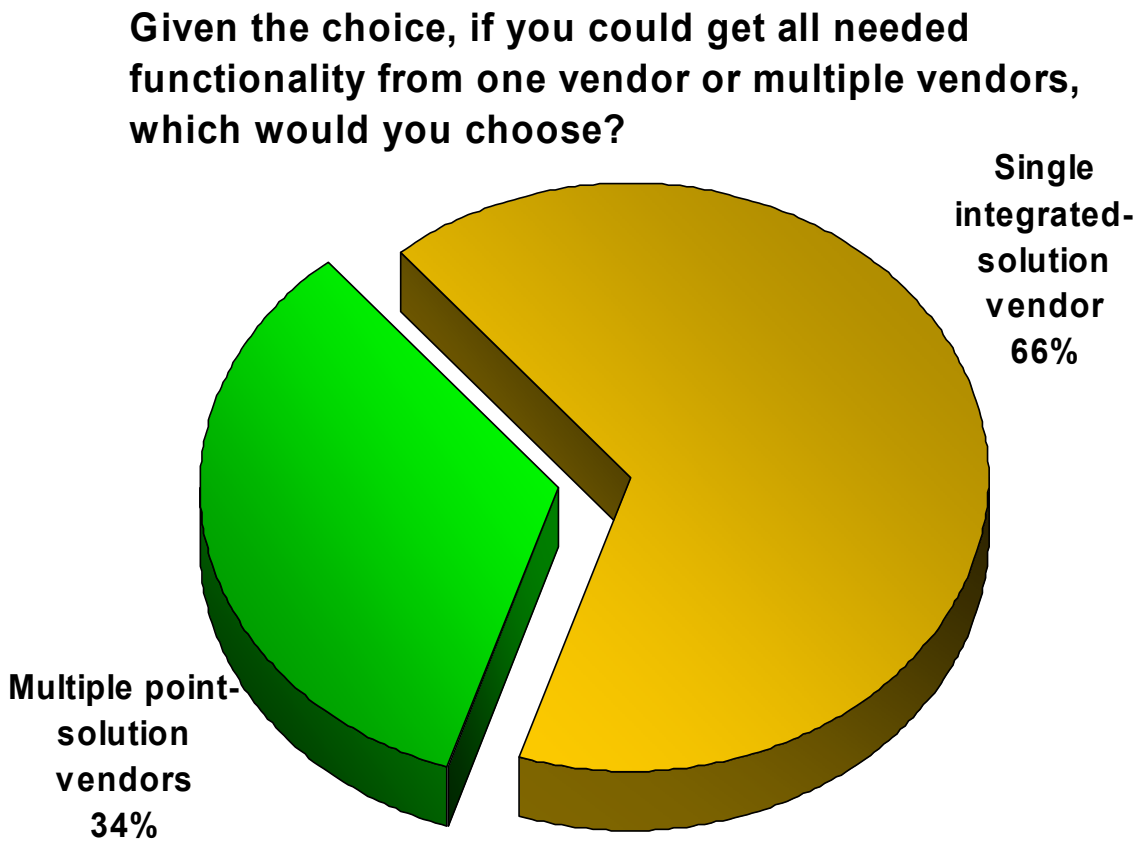
Returning now to the survey sample as a whole, we asked about preferences in system type, if all functionalities were available. The overall sentiment was clear:



The reasons for preferring an all-in-one solution were made plain during our site visits. The manager of a center with a soft switch all-in-one system said "I have ONE administrator who knows everything. Even better, I have ZERO telecom people. This is heaven compared with my last job."

In another center, management has a hard switch ACD system, but uses the same vendor and VAR for its entire portfolio of technology products, with satisfactory results.

From the research, we can conclude that as a whole, contact center managers recognize the value of, and would prefer to work with, a single vendor.

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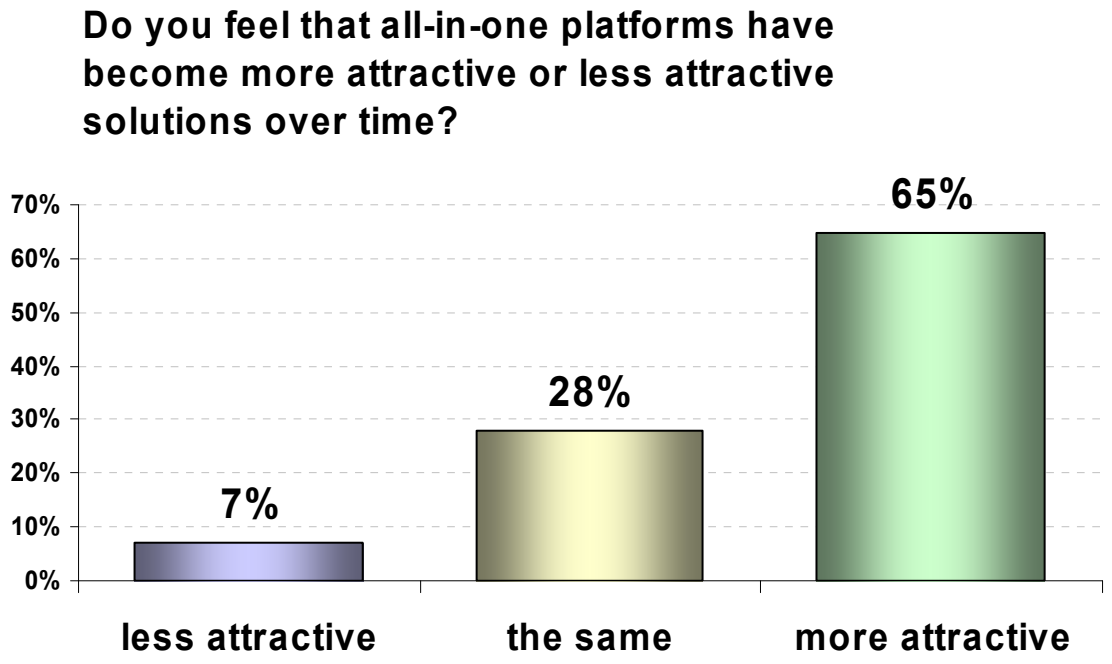
All-in-One versus Multi-Point Installed Solutions

Conclusion: Single Vendor is Preferred

From the research, we can conclude that as a whole, contact center managers recognize the value of, and would prefer to work with, a single vendor.



Given the complexity of running a call center or contact center, the study shows that management appreciates anything technology can do to simplify operations. Both the sample statistics presented and the site visits confirmed a widely-held impression that companies offering all-in-one solutions have made positive strides in recent years to make their offerings more comprehensive for the center and more useful for managers and customers. Consequently, the survey numbers show that a two-thirds majority of respondents feel all-in-one platforms are rising in attractiveness, and only 7% feel they are becoming less attractive.

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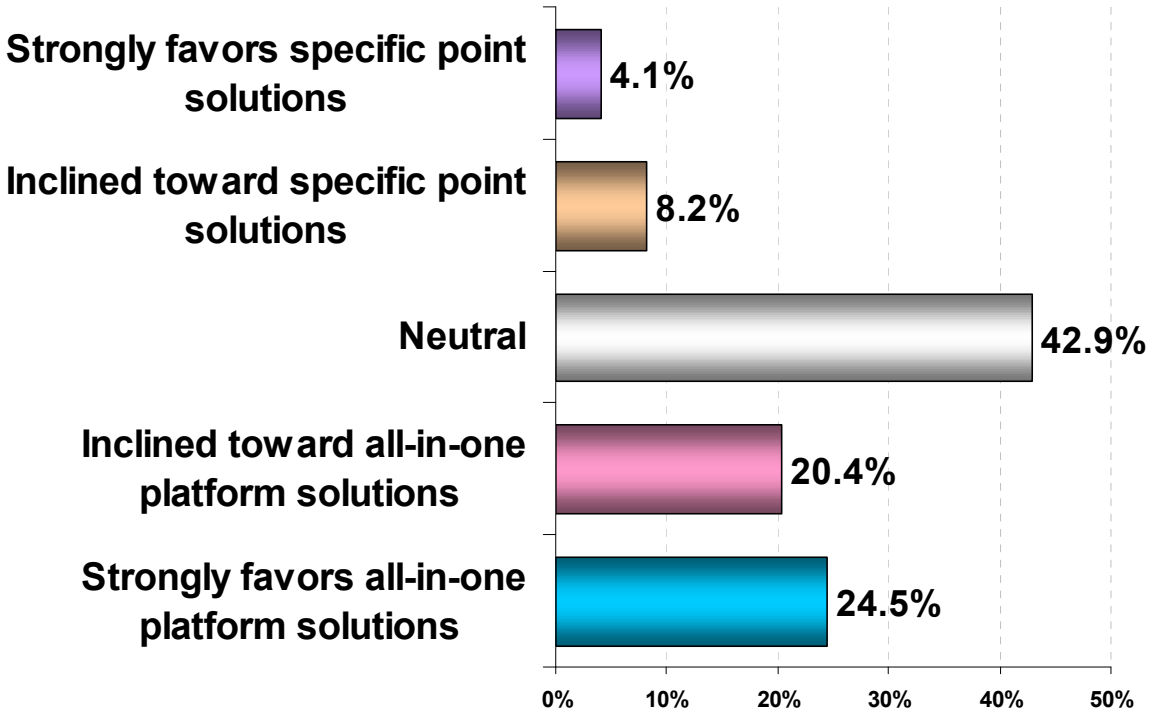
Conclusion (continued)

Does your CTO / IT department favor all-in-one platform solutions or specific point solutions?



The surveys asked call center and contact center managers to respond to this question on behalf of their CTOs. This shows that 44% of those managers and CTOs are inclined toward, or strongly favor all-in-one solutions, while 12% are inclined toward, or strongly favor, multi-point solutions.

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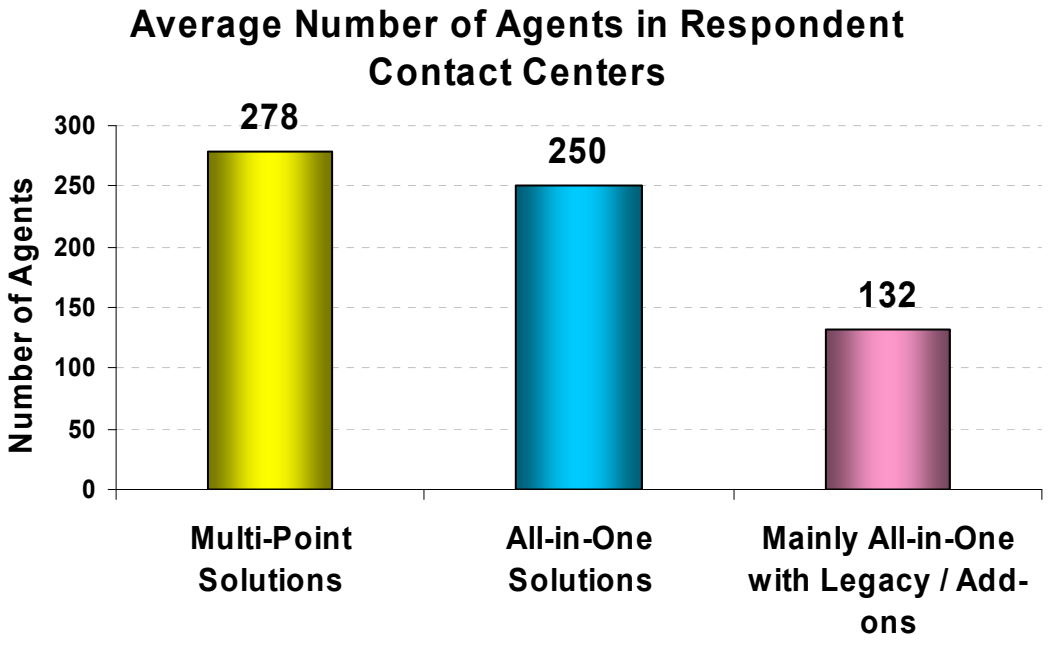
Data Cuts: Multi-Point versus All-in-One

For some of the survey questions, we re-cut the data between the following three categories of call centers:

1. Multi-Point solution centers;
2. All-in-One solution centers; and
3. Centers that had all-in-one platforms augmented by legacy and other systems.

The sizes of the centers were very similar as between multi-point centers and all-in-one centers, while those with a mixed platform were somewhat smaller in terms of number of agents:



One striking point is the larger number of systems administrators found in the multi-point centers as compared with the all-in-one centers, despite the similar size overall:

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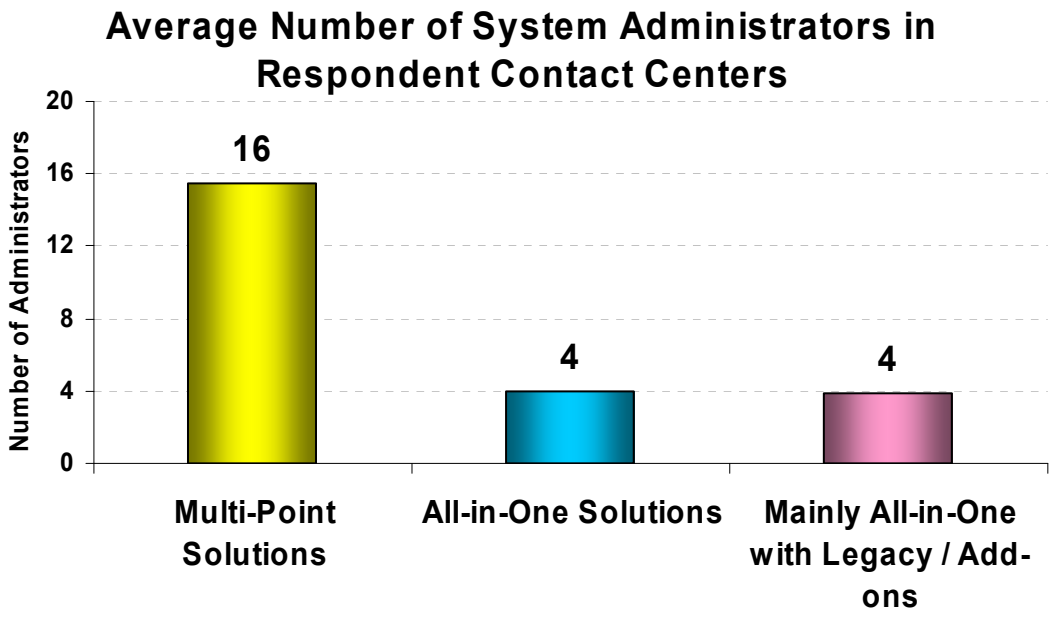

The cost associated with this delta is substantial, and could be estimated as follows:

Typical annual cost of a systems administrator (salary + benefits):	$ 104,000
Difference in number of administrators:	12
Added average cost associated with multi-point centers:	$1,248,000

Put another way, a typical annual budget for a 278-agent center would be around $15 to $20 million. The delta here could therefore represent a savings of +5% of budget.

Turning again to the Technical Process Phases, interesting data came out of the question: "Will your current system support planned additions without significant modification or integration issues?"

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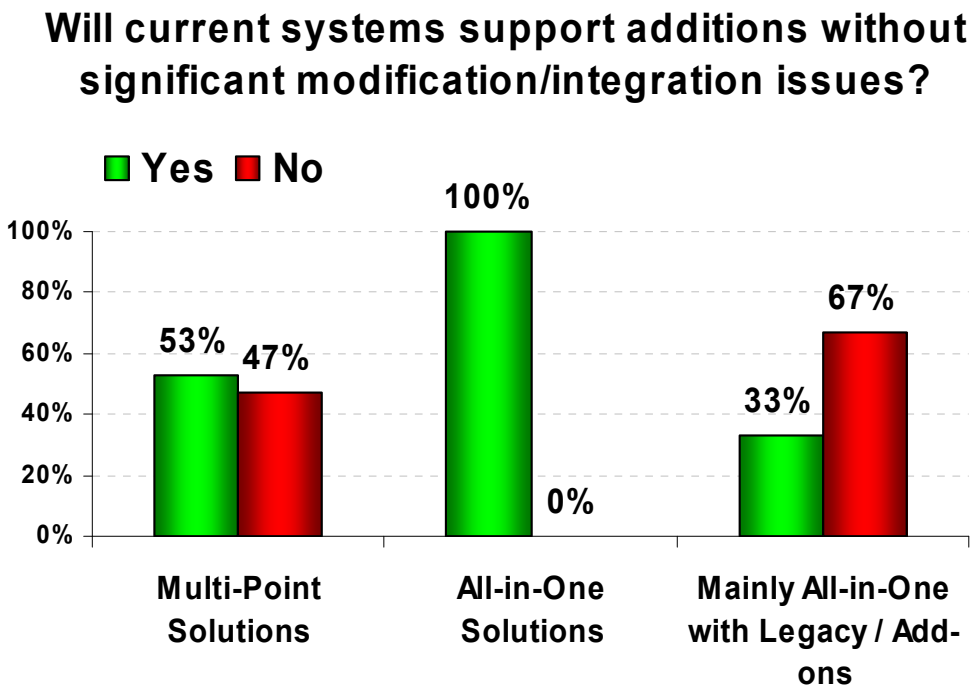

Clearly, survey respondents utilizing all-in-one solutions feel confident about specifying and integrating new technology additions with few problems, which indicates a high level of confidence about their platforms. However, just over half of the respondents with multi-point solutions feel the same confidence. Interestingly, respondents who currently rely on mixed systems demonstrated the least confidence in adding technology without significant integration issues. This might indicate that all-in-one solution customers face greater challenges when they must integrate with legacy or other stand-alone systems.

The integration piece of the Technical Process Phases is also indicated by the following data cut, which covers 8 important contact center solutions:

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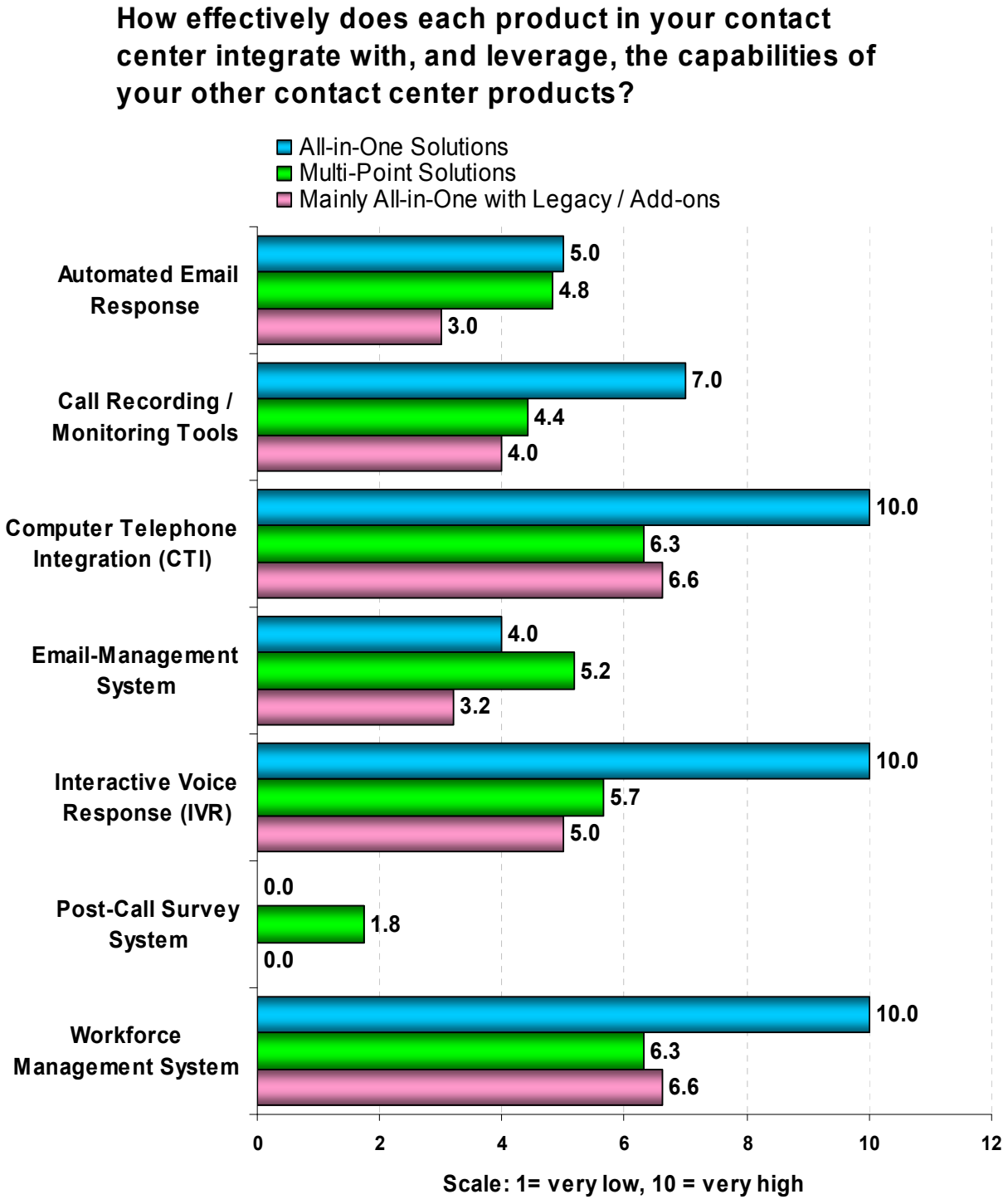

Here again the data indicate that the all-in-one centers generally experience the easiest time of bringing most new technologies online. The multi-point centers have a measurably more difficult time, except for email and post-call surveys, while those with a mixed system have

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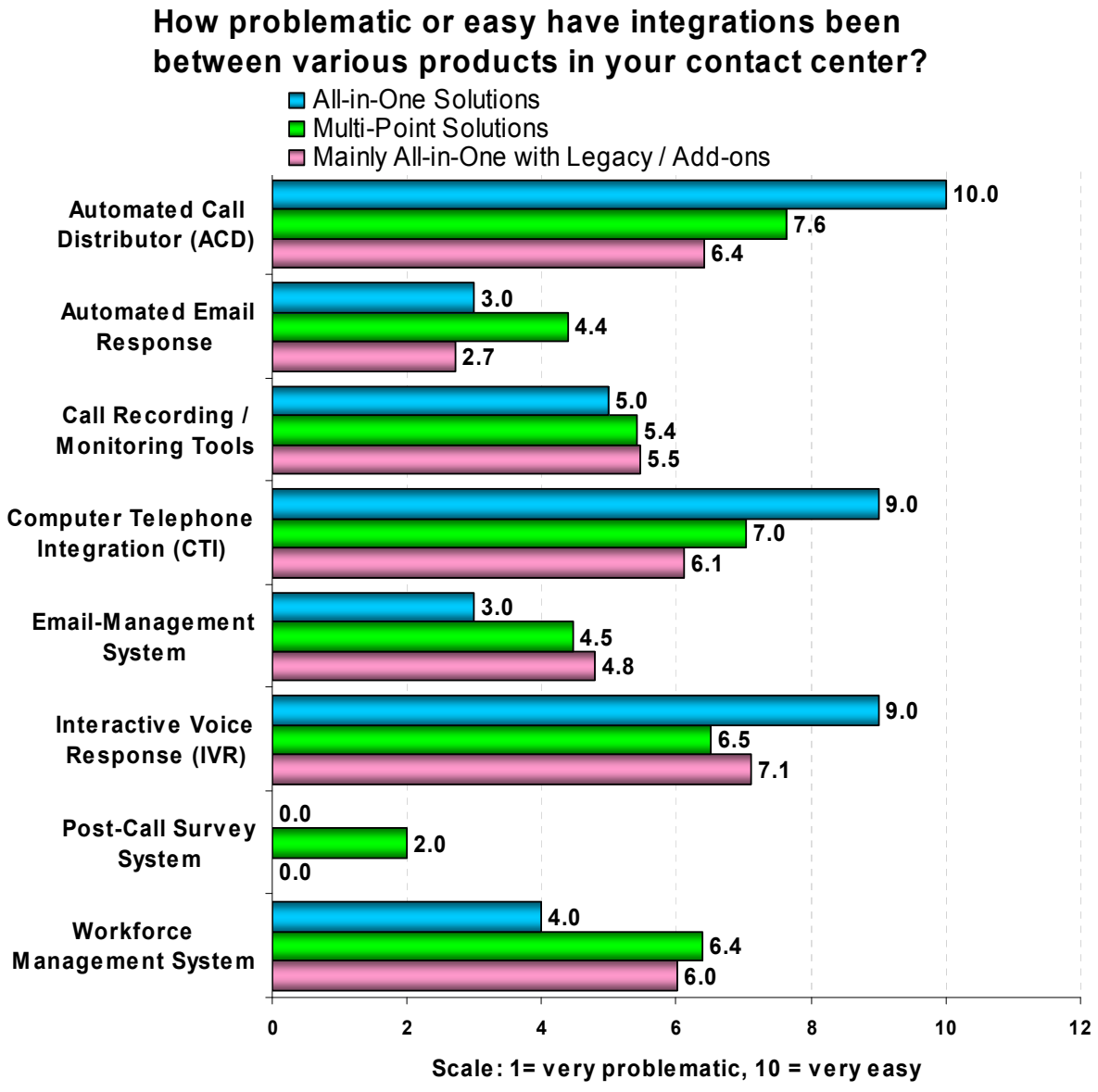
the hardest time integrating additional technology. Overall, the integration and ability to integrate applications for call recording, workforce management, email auto-response, interactive voice response, and CTI were better for all-in-one solutions than they were for multi-point products or mixed environments. Somewhat surprisingly, the element that engenders the most frustration right now is post-call survey systems — the solutions that are supposed to provide valuable feedback on customer satisfaction and agent performance.

Once brought online, we also wanted to see how effectively managers felt technology solutions worked with and leveraged the capabilities of other contact center products installed. The answer to that question tracked the previous question closely and was as follows:



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The special cut of the survey gave mixed results. However, the highest marks (representing the easiest integrations) were reserved for the all-in-one solutions involving the voice channel.

It is interesting to note the difference between this chart (with its mixed results) and the chart cited on page 38, in which all all-in-one respondents indicate that their systems could support additions without significant issues. The "forward-looking" confidence (per page 38), as compared with problems experienced in the past (above), may be due to several factors, on which we can only speculate, including initial changeover to an all-in-one system from legacy systems.

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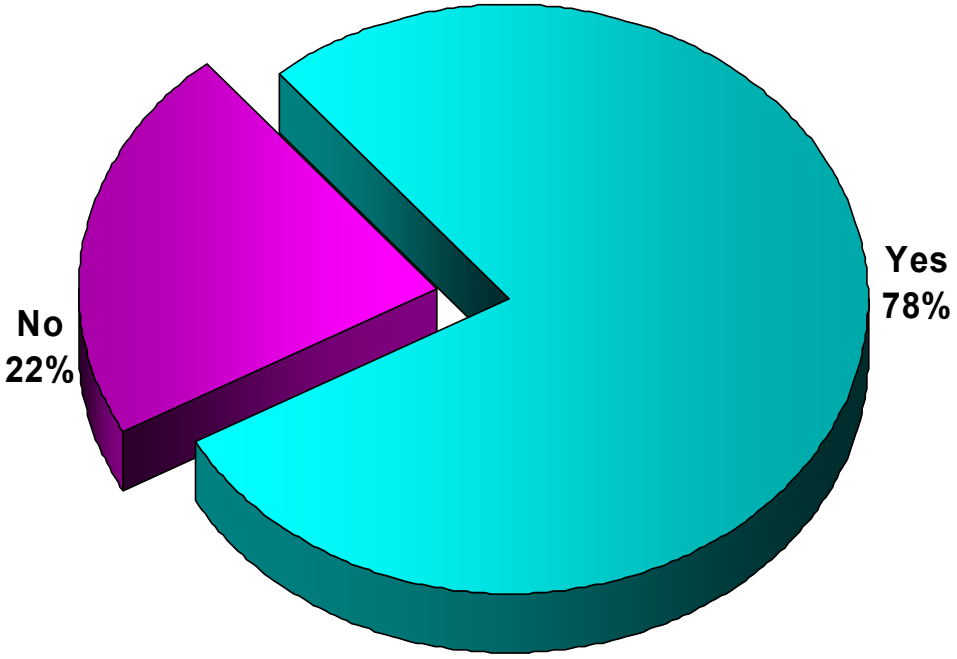
The Importance of Blending Communications

Do you consider the ability to blend contact center agents and enterprise/business users on one telephony system an important requirement?



As the barriers between contact centers and the rest of the enterprise come down and the need to communicate with colleagues in other departments increases, the ability of contact center telephony technology to mesh seamlessly with the rest of the enterprise becomes more important. In fact, nearly 4 in 5 of respondents said that this was important to them.

This strongly favors vendors who have the capability of furnishing a seamless telecom solution that stretches over the contact center and the rest of the enterprise.

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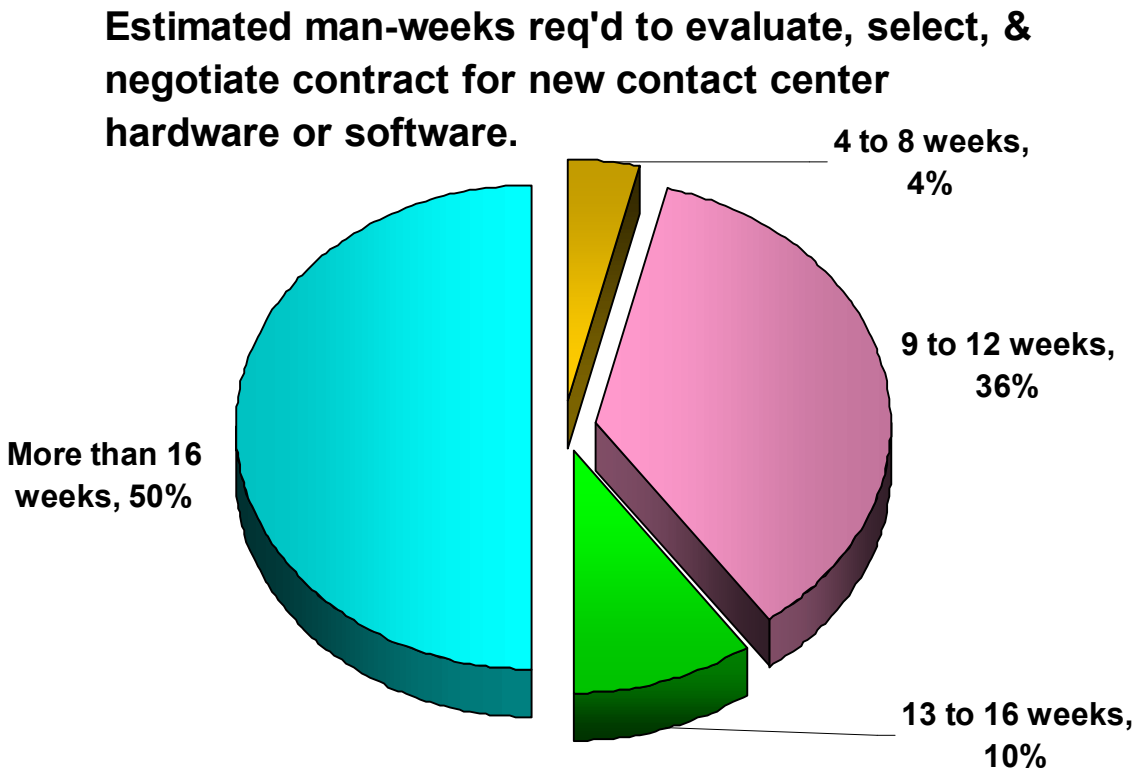
Supporting Technology Additions



The investment in time and personnel is significant and measurable for most contact centers.

The site visits confirmed that the eagerness for new solutions is tempered by the anticipated pain of acquisition and implementation. In this case, the anticipated pain is somewhat reduced in the case of those with all-in-one solutions systems. This springs from the following factors:

- The new functionality is seen less as a major new acquisition of technology and more as an addition of "the next module" of a complete suite;
- The vendor is a known quantity… It is not necessary to go through a complete RFP or vetting process, which consumes precious time; and
- The current administrator is sufficient in most cases.

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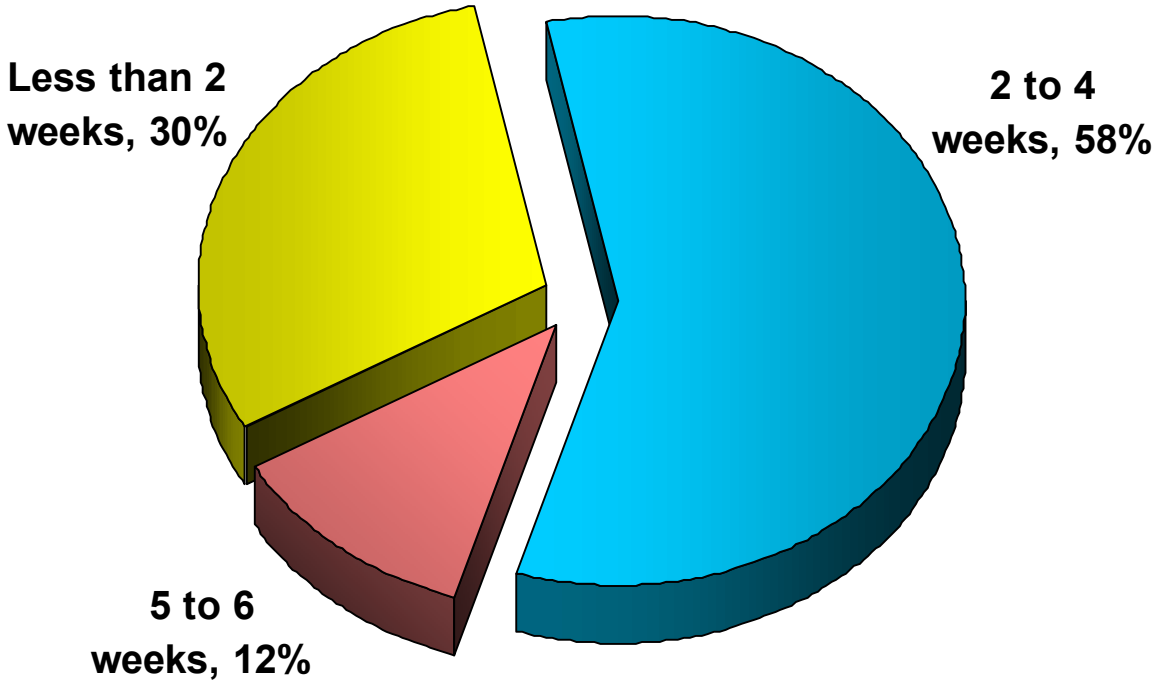
Estimated time required for a contact center administrator to learn a new admin interface for a hardware or software product.



Significant resources are also needed to bring administrators up to speed during the pre-launch period.

The Importance of Blending Communications Supporting Technology Additions

Conclusion: Common Administrative Interface Reduces Costs

A conclusion could be clearly drawn that shows that there are hard-dollar costs associated with administrators having to learn new administration interfaces (most commonly 2-4 weeks). An all-in-one solution with a common administrative interface would all but eliminate those costs.

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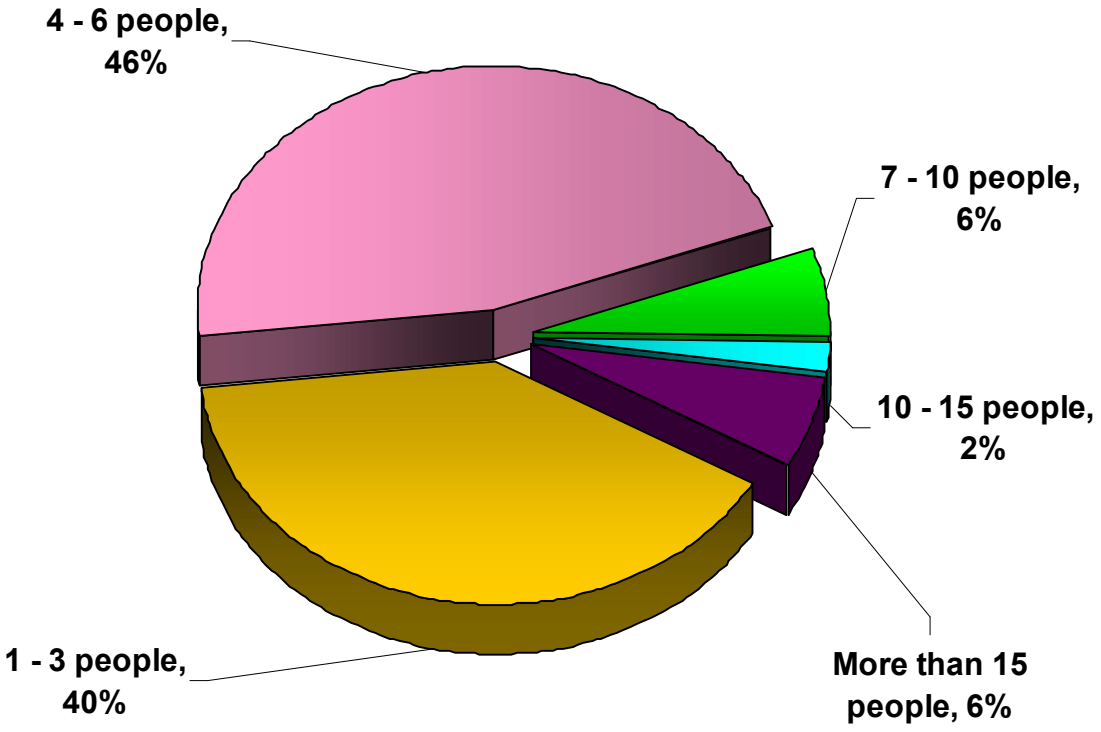
Number of people (administrators) within the contact center who get trained on each new product installed in the contact center.



The number of people is significant and can represent a notable fraction of the cost of the new technology.

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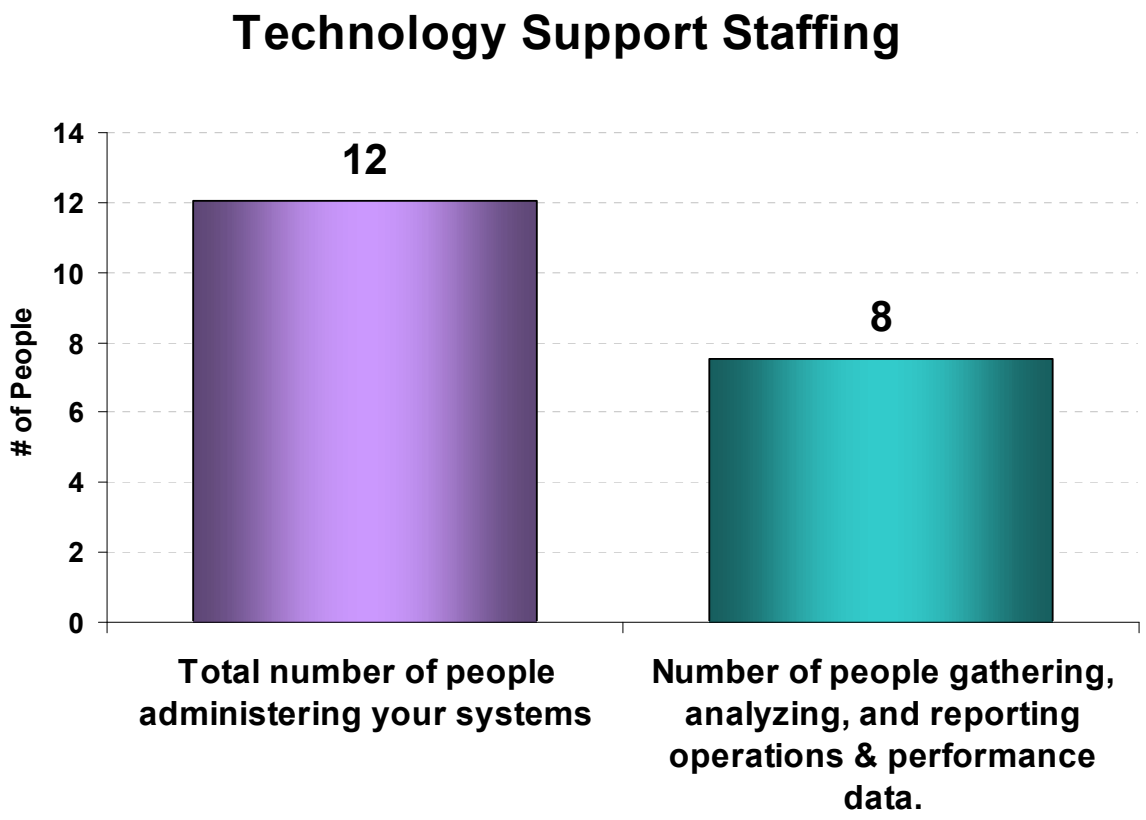

Similarly, the number of staff needed to support technology solutions is high overall.

Summary: The Technology Process Phases and Choice of Solution Type

Looking at the data and anecdotes through the lens of the Technology Process Phases described above, we notice the following:

1. **Specification.** For anyone building a contact center from the ground up, or who is conducting a complete technology review of their existing center, identifying needs and specifying appropriate "pieces" of technology is an important step. There are several major systems and, over 163 piece parts (according to our previous research) in all, that make up the contact center / CRM puzzle. The major systems include:
    a. ACD (Automatic Call Distributor);
    b. IVR (Interactive Voice Response);
    c. Voice Recognition;
    d. CTI (Computer Telephony Integration);
    e. Intelligent Routing;
    f. Workforce Management;
    g. Hiring and Training Software;
    h. Contact Recording and Quality Monitoring; and
    i. Universal Messaging, in those situations where the contact center connects to the rest of the enterprise

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In the multi-point world this involves identifying all the elements by oneself or with the help of paid consultants.

For those opting for the all-in-one approach, the vendor's suite becomes the de-facto starting point for the manager. Since the object of the suite is to satisfy the entire center's technology needs, the suite's offerings become like a catalogue for people decorating their home. The supplier sits with them and reviews each product, probing for needs and building an operational and financial case for adoption. The vendor thus matches the customer needs with its offerings, and proposes a comprehensive or a progressive solution.

2. **Suppliers.** By definition, the multi-point approach involves working with a number of suppliers, each of whom represents a discovery process, a relationship and a dedication of time. The elements include some or all of the following:

    a. RFI (Request for Information) processes, in which center management researches the market and asks likely vendors to provide preliminary information that can help it construct an RFP;

    b. RFP (Request for Proposal) processes, which involve creating and issuing a detailed document of requirements to a number of vendors, requesting that they, in turn, provide a detailed document indicating why their product offering and price are the best;

    c. Presentations process, in which vendors are invited to make formal presentations to the prospective customer; and finally,

    d. Negotiations process, in which a contract is finalized with the selected suppliers.

    Also by definition, the all-in-one solution customer chooses one supplier at the beginning, perhaps by the process phases described above. Having chosen its preferred all-in-one supplier, it then saves the time, effort and money associated with the above process phases going forward.

3. **Installation.** This phase involves the installation of the chosen solution and its integration into the overall system.

    In the case of the multi-point solution customer, each new system must be installed and integrated on an ad hoc basis, possibly encountering technical problems and glitches along the way, which can cost unforeseen time and expense.

    In the case of the all-in-one solution customer, the vendor adds on the required product module. These modules, as integral parts of the vendor suite of products, do not require any third party to integrate them.

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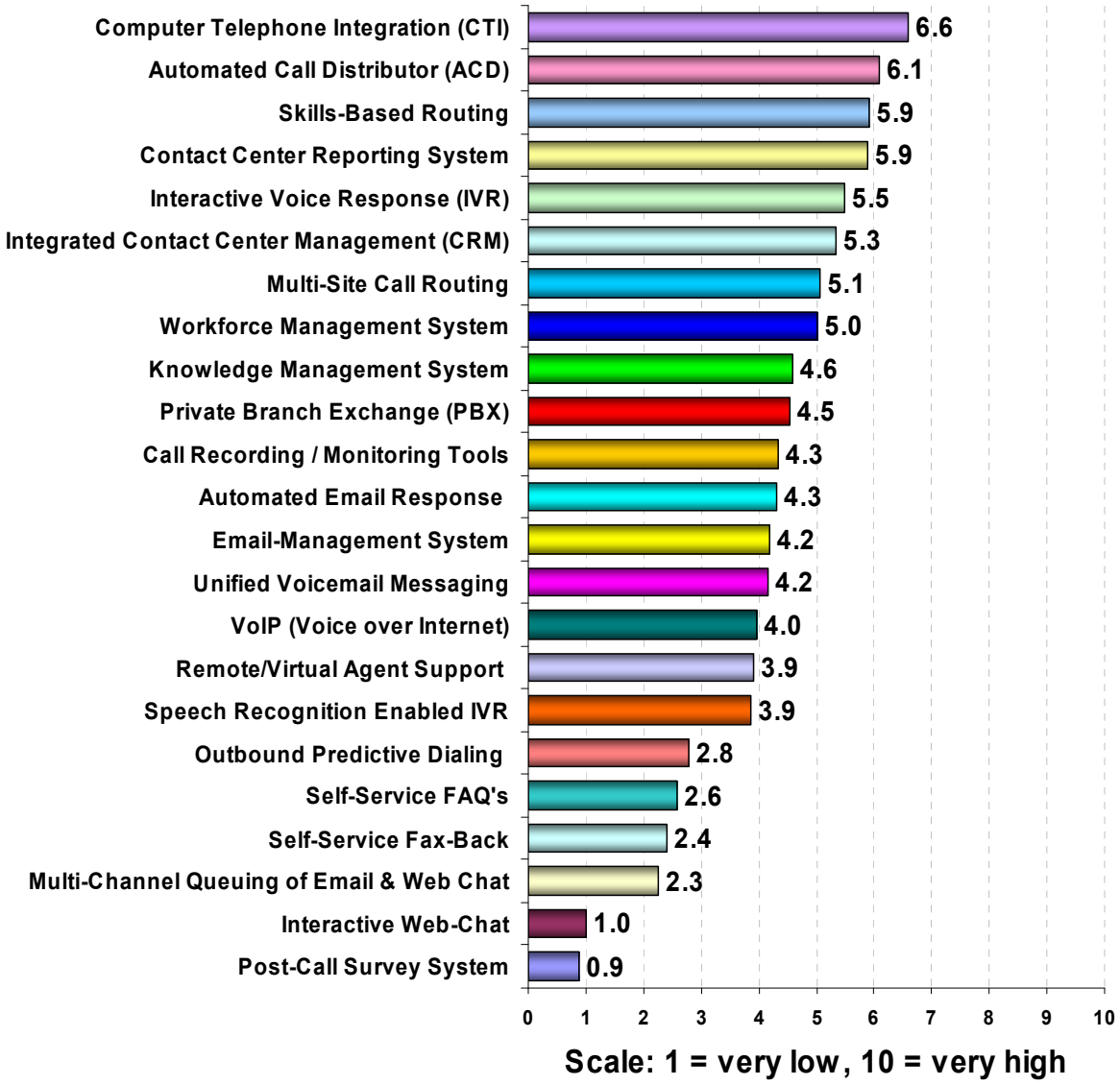
Effectiveness of Integration and Leveraging Capabilities

How effectively does each product in your contact center integrate with, and leverage, the capabilities of the other contact center products you have installed?



4. **Transition.** This phase involves the changeover from the current solution, whatever it may be, to the newly purchased solution.

   Multi-point systems must plan carefully to execute a smooth transition, taking into account the integration and human elements involved. Even so, it is not uncommon to run into technical and HR difficulties when transitioning to a new system.

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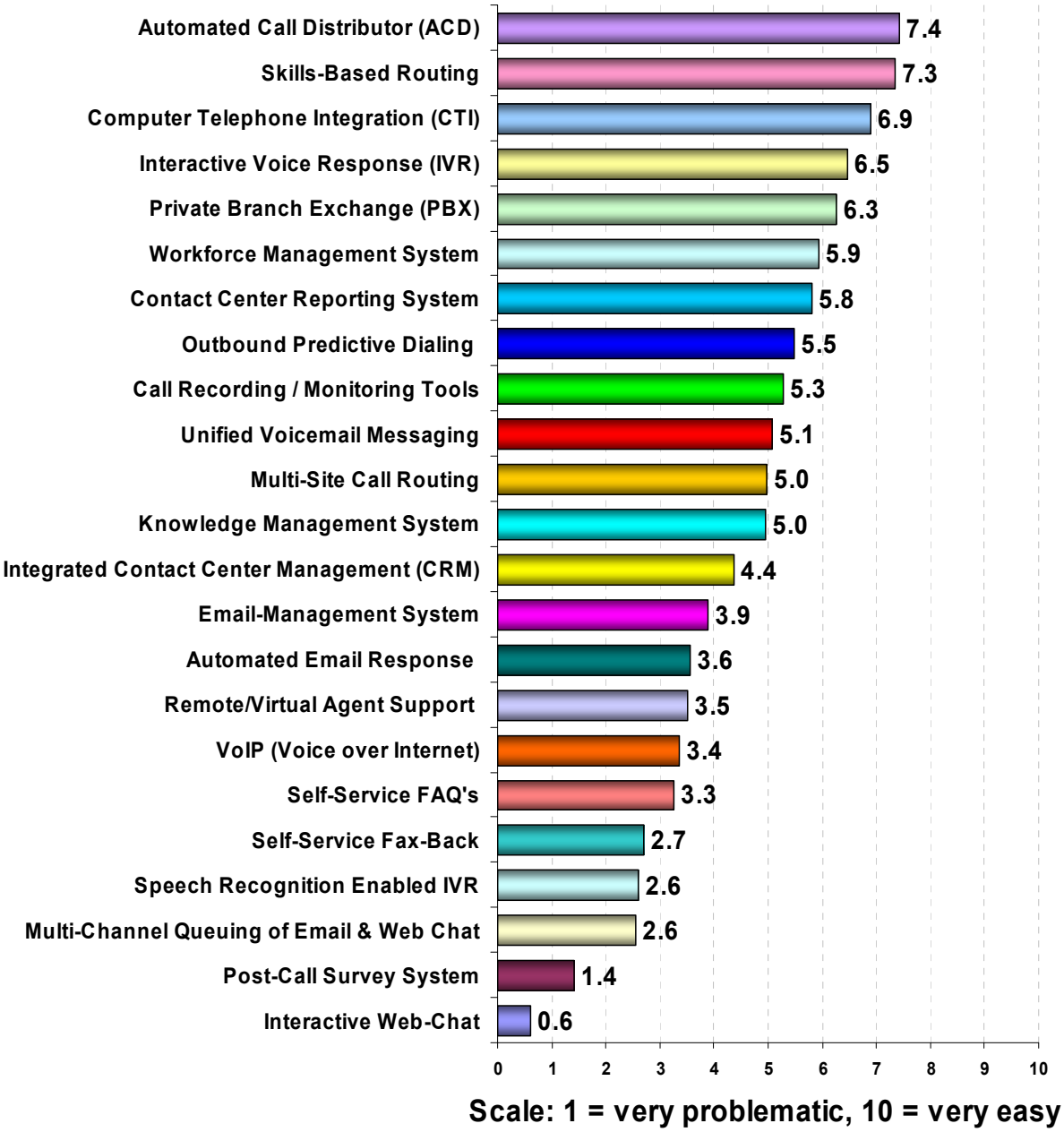
All-in-one solutions present lesser challenges. The technology is "born" integrated, and should not cause problems. Difficulties of the human kind are still present, though resistance to change can be lessened by the compatible "look and feel" of the common-suite products. Screens, fonts and colors will look friendly and not foreign, smoothing the transition for many people.

How problematic or easy have integrations been between various products in your contact center?



The above listing being from most problematic to least problematic.

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5. **Operation.** Once transitioned, the new system must function reliably, be administered by someone on site, and be maintained and upgraded over time.

   For multi-point systems, each major system requires an on-site administrator and the maintenance of a vendor relationship and contract file. Upgrades must be signaled through each individual supplier.

   All-in-one solutions consolidate the administration into one or two people, and consolidate the vendor relationship, including upgrade functions, into one.

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SUMMARY OF IMPACT FACTORS

The research revealed that the following Impact Factors were operating in the centers visited:

1. **"Cultural factors" play a major role in enterprise approaches to technology decisions.** That is, the attitudes and experiences with Customer Contact technology that people share in the organization (oftentimes as a result of common experiences, good and bad) create a powerful backdrop against which discussions are framed and decisions are made. People who feel they can handle complexity, customization and integration due to core competencies or past experiences are more likely to favor a multi-point solution approach.
2. **Resource availability (aka budget) varies widely among organizations and has an obvious impact on technology discussions and decisions.** Centers studied on-site ranged from one center where the manager was regularly asked if he needed more money, to centers that could only dream of getting the minimum necessary just to hold things together for next year.
3. **Existing IT systems.** This "legacy factor" is undoubtedly more restricting than it should be in some cases. It is difficult, in the midst of battle, to imagine a world in which familiar screens and trusty old IVRs are tossed out in favor of totally new systems. This is true even where rudimentary ROI analyses and process scenarios might justify the move.
4. **Existing vendor relationships.** This is another "legacy factor" and ties into, but is distinguishable from, the previous factor. Where existing vendor relationships have been positive on a personal and a technical level, managers may not feel a need to look at other options, even if budget is not forcing them to stay with legacy systems. In the words of one center manager, "We have a good relationship with our vendor. They have been reliable and reasonable and we don't see the need for RFP processes… nor do we have the time."
5. **Brand name vs. completeness of solution.** Again, this is slightly different than the two previous items. This Impact Factor refers to the fact that purchase decisions are often made based on the dominance of leading vendors. Customers will frequently make a "safe" purchase decision by buying from a vendor with high market share, giving less consideration to product factors that are more relevant to the overall success of the contact center. This approach clearly can limit the effectiveness of the purchase decision.
6. **Future Trends.** The need for strategic preparedness is a final Impact Factor that is not shared evenly, however. Certain centers are very focused on getting it right for the long haul, according to a full vision of where their contact center should be. Others have a more narrow, immediate-term vision. This, too, has an important impact on technology discussions and decisions.

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CONCLUSIONS FROM SURVEY AND ON-SITE OBSERVATIONS

Assembling and managing a contact center is a very complex business. Getting the right people, processes and technologies all aligned to cultivate loyal customers and build enterprise value is difficult at best.

Against this backdrop, the complexity or simplicity of technology plays an important role in the success and the cost structure of the center. The simpler and more seamless the technology component, the smoother the processes can be and the more effective (and satisfied) the human components can be, all other things being equal. Managers, by and large, consider the advantages and disadvantages of technology against all of the key Technology Process Phases, from specifying solutions through to operation and maintenance of systems.

The voice of the market is clear from the survey. Managers would prefer a single, all-in-one source for all of their technology needs, with a key consideration being that they want that source to provide them with best in class functionality. The participants generally see the all-in-one approach as the trend for the future. In their eyes it has become more attractive over time.

In terms of the future, two items that come out of the study must be mentioned:

- The current weight of legacy systems, prior experiences and existing vendor relationships will act as drags on migration toward all-in-one solutions; and
- The all-in-one providers will need to be vigilant in creating, maintaining, and demonstrating best-in-class functionality for all of their offerings.

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BIOGRAPHIES

Principal Investigator

Dr. Jon Anton (also known as "Dr. Jon") is an Adjunct Professor at Purdue University and Director of Benchmark Research at the Center for Customer-Driven Quality™ at Purdue. He specializes in enhancing customer service strategy through inbound call centers, and e-business centers, using the latest in telecommunications (voice), and computer (digital) technology. He also focuses on using the Internet for external customer access, as well as Intranets and middleware.

Since 1995, Dr. Jon has been the principal investigator of the Purdue University Call Center Benchmark Research. This data is now collected at the BenchmarkPortal.com Web site, where it is placed into a data warehouse that currently contains over 10 million data points on call center performance.

Dr. Jon has assisted more than 400 companies in improving their customer service strategy/ delivery by the design and implementation of inbound and outbound call centers, as well as in the decision-making process of using teleservices providers for maximizing service levels while minimizing costs per call. In August of 1996, *Call Center Magazine* honored Dr. Jon by selecting him as an Original Pioneer of the emerging call center industry. In October of 2000, he was named to the Call Center Hall of Fame. In January of 2001, he was selected for the industry's "Leaders and Legends" Award by Help Desk 2000. He also is a member of the National Committee for Quality Assurance.

Dr. Jon has guided corporate executives in strategically re-positioning their call centers as robust customer access centers through a combination of benchmarking, re-engineering, consolidation, outsourcing, and Web-enablement. The resulting single point of contact for the customer allows business to be conducted anywhere, anytime, and in any form. By better understanding the customer lifetime value, Dr. Jon has developed techniques for calculating the ROI for customer service initiatives.

Dr. Jon has published 117 papers on customer service and call center methods in industry journals. In 1997, one of his papers on self-service was awarded the best article of the year by *Customer Relationship Management Magazine*.

Dr. Jon has additionally published 24 professional books:

1. *Enabling IVR Self-Service with Speech Recognition*
2. *Contact Center Management By The Numbers*
3. *Managing Web-Based Customer Experiences*

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4. *From Cost to Profit Center: How Technology Enables the Difference*
5. *Customer Service and the Human Experience: We, the People, Make a Difference*
6. *Customer Service at a Crossroads*
7. *Offshore Outsourcing Opportunities*
8. *Optimizing Outbound Calling*
9. *Customer Relationship Management Technology*
10. *Customer Obsession: Your Roadmap to Profitable CRM*
11. *Integrating People with Process and Technology*
12. *Selecting a Teleservices Partner*
13. *How to Conduct a Call Center Performance Audit: A to Z*
14. *20:20 CRM A Visionary Insight into Unique Customer Contact*
15. *Minimizing Agent Turnover*
16. *e-Business Customer Service*
17. *Customer Relationship Management*
18. *Call Center Performance Enhancement Using Simulation and Modeling*
19. *Call Center Benchmarking: How Good is "Good Enough"*
20. *Listening to the Voice of the Customer*
21. *Contact Center Management by the Numbers*
22. *Customer Relationship Management: Making Hard Decisions with Soft Numbers*
23. *Inbound Customer Contact Center Design*
24. Computer-Assisted Learning

Dr. Jon's formal education is in technology, including a Doctorate of Science and a Master of Science from Harvard University, a Master of Science from the University of Connecticut, and a Bachelor of Science from the University of Notre Dame. He also completed a three-summer intensive Executive Education program in Business at the Graduate School of Business at Stanford University.

Dr. Jon can be reached at 765-494-8357 or at DrJonAnton@BenchmarkPortal.com.

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Research Director

Bruce Belfiore is the Director of Best Practice Research at BenchmarkPortal, Inc., which provides best practices information to the customer contact industry worldwide.

A dual national, Bruce has divided his career between North America and Europe, and has fulfilled work assignments in Asia and Africa as well. He has worked in the finance sector with international commercial and investment banks. Bruce worked with the Bain & Co. management consulting group in Italy and formed a specialty unit advising clients in the field of corporate finance. While in Europe, Bruce was also a speaker and writer on business topics in English and Italian.

Bruce first became involved in the call center sector more than a decade ago and joined BenchmarkPortal, Inc. in 2000. He is the author of the books *Benchmarking for Profits!*, a manual for best practices call center benchmarking, as well as its sequel, *Benchmarking at its Best for Contact Centers*. He also is currently working on another book, *Shareholder Value and Customer Contact* with Dr. Jon Anton of Purdue University.

He is involved with the certification of Contact Centers of Excellence under the Center of Customer-Driven Quality at Purdue University, administered by BenchmarkPortal. He is also an instructor with the College of Contact Center Excellence, which provides an advanced curriculum to contact center managers.

Bruce is co-inventor of a patent for a symbolic language system, Simbly™, with important call center applications. Simbly, which uses nested symbols to encapsulate and standardize frequently used text "chunks" has been shown in research to lower data entry time by 17% to 20%, and offers advantages to operations that must deal with more than one language.

Bruce holds an A.B. degree from Harvard College, a J.D degree from Harvard Law School, and an MBA degree from Harvard Business School, where he also attended the HBS Entrepreneur's Tool Kit program in 2000. He has published numerous articles and has been a featured speaker both in English and Italian on a variety of business topics.

Bruce can be reached at BruceBelfiore@BenchmarkPortal.com.

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Content Editor

John Chatterley is Director of Content & Analysis and Chief Editor at BenchmarkPortal, Inc. John has published numerous books, customized benchmarking reports, research reports, One-Minute Survey reports, and White Papers. He also authored a comprehensive study entitled "Improving Contact Center Performance through Optimized Site Selection," and co-authored the books *Offshore Outsourcing Opportunities* and *Selecting a Teleservices Partner*. John is also senior content writer of the books *Contact Center By The Numbers* and *Automated Self-Service Using Speech Recognition*, and is editor of the annual series of 42 detailed Benchmarking Industry Reports covering the spectrum of contact center vertical industry sectors.

John is a Purdue Certified Contact Center Auditor, Certified AT&T Call Center College Instructor, and BenchmarkPortal Certified Benchmarking Instructor and Analyst. His professional career spans more than 20 years of experience in contact center management and consulting.

Prior to joining BenchmarkPortal, John was Director of Operations, Site Development and Facilities Management for MicroAge Teleservices, a Fortune 500 teleservices provider. He additionally has designed, implemented, staffed and managed three 500+ seat contact center sites in Arizona, Nevada, and California, and possesses extensive first-hand knowledge and experience at all levels of contact center operations including front-line technical support agent, supervisor, team lead, reports analyst, contact center design, contact center manager, and operations director.

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APPENDIX A

Brief List of Solution Providers

All-in-One Vendors On-Premise

1. Interactive Intelligence
2. Telephony @ Work (purchased by Oracle)
3. Avaya
4. Nuasis (purchased by Intervoice)
5. Apropos (purchased by Syntellect)

All-in-One Off-Premise

1. MCI
2. UCN
3. Contactual
4. Five9
5. Cosmocom

Multi-Point Vendors

1. Nortel
2. Cisco
3. Aspect
4. Genesys (purchased by Alcatel)
5. Witness Systems
6. Siemens

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APPENDIX B

Detailed Survey Results

The survey results presented in the following pages are the result of responses by contact center managers to BenchmarkPortal's custom survey regarding the use of technology in contact centers.

Technology in Contact Centers

1. Which of the following technologies does your contact center currently use, or which you are considering / planning to add within the next year?

	Respondent Average: Currently have technology	*Respondent Average: Planning to add technology within a year.*	*Respondent Average: Neither have technology nor plan to add within a year*
		Respondent Averages	
Automated Call Distributor (ACD)	100%	0%	0%
Computer Telephone Integration (CTI)	70%	30%	0%
Interactive Voice Response (IVR)	88%	12%	0%
Private Branch Exchange (PBX)	88%	0%	12%
Call Recording / Monitoring Tools	88%	12%	0%
Post-Call Survey System	17%	76%	7%
Automated Email Response	53%	40%	7%
Email-Management System	53%	40%	7%
Self-Service FAQ's	67%	25%	8%
Self-Service Fax-Back	37%	41%	22%
Speech Recognition Enabled IVR	27%	57%	16%
Interactive Web-Chat	9%	78%	13%
Integrated Contact Center Management (CRM)	52%	40%	7%
Contact Center Reporting System	67%	33%	0%
Knowledge Management System	44%	49%	7%
Multi-Channel Queuing of Email & Web Chat	11%	78%	11%
Multi-Site Call Routing	58%	35%	8%
Outbound Predictive Dialing	44%	38%	19%
Remote/Virtual Agent Support	42%	48%	9%
Skills-Based Routing	91%	9%	0%
Unified Voicemail Messaging	71%	21%	8%
VoIP (Voice over Internet)	37%	56%	7%
Workforce Management System	69%	31%	0%
Other *(See below):*	1%	0%	99%

- Integrated tools
- Directory Assistance

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2. Will your current system support planned additions without significant modification or integration issues?

	Respondent Average
Yes	50%
No	50%

3. Please tell us whether the technologies you currently use in your contact center are provided by multiple point-solution vendors or a single integrated-solution vendor:

	Respondent Average
Multiple point-solution vendors	73%
Single integrated-solution vendor	6%
Mainly single integrated-solution vendor with some add-ons or legacy systems	20%

4. Did you consider purchasing an all-in-one platform versus the functionally specific point solutions that you purchased?

	Respondent Average
No	79%
Yes	21%

If Yes, what caused you to select the point solutions?

- Best functionality at the time we were shopping for it
- Didn't have all the desired solutions
- Difficulty of adapting legacy systems to "All-in-One" solutions
- IT requirements overidding the business requirements
- Lack of availability of such all in one system in the market

5. Did you consider purchasing functionally specific point solutions vs. the all-in-one platform for the systems that you purchased?

	Respondent Average
No	86%
Yes	14%

If yes, what caused you to select the all-in-one offering?

- Long term relationships w/ the vendor. Trust in the solutions provider.
- No "best of" point-solution available
- Easier to administer, and to adapt to change.
- Support easier and less costly
- Ease of management

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6. On a scale of 1 to 5, how effectively does each product in your contact center integrate with, and leverage, the capabilities of the other contact center products you have installed?

	Respondent Average *Scale: 1 = very low, 10 = very high*
Automated Call Distributor (ACD)	6
Computer Telephone Integration (CTI)	7
Interactive Voice Response (IVR)	6
Private Branch Exchange (PBX)	5
Call Recording / Monitoring Tools	4
Post-Call Survey System	1
Automated Email Response	4
Email-Management System	4
Self-Service FAQ's	3
Self-Service Fax-Back	2
Speech Recognition Enabled IVR	4
Interactive Web-Chat	1
Integrated Contact Center Management (CRM)	5
Contact Center Reporting System	6
Knowledge Management System	5
Multi-Channel Queuing of Email & Web Chat	2
Multi-Site Call Routing	5
Outbound Predictive Dialing	3
Remote/Virtual Agent Support	4
Skills-Based Routing	6
Unified Voicemail Messaging	4
VoIP (Voice over Internet)	4
Workforce Management System	5
Other	3

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7. On a scale of 1 to 10, how problematic or easy have integrations been between various products in your contact center?

	Respondent Average
	Scale: 1 = very problematic, 10 = very easy
Automated Call Distributor (ACD)	7
Computer Telephone Integration (CTI)	7
Interactive Voice Response (IVR)	6
Private Branch Exchange (PBX)	6
Call Recording / Monitoring Tools	5
Post-Call Survey System	1
Automated Email Response	4
Email-Management System	4
Self-Service FAQ's	3
Self-Service Fax-Back	3
Speech Recognition Enabled IVR	3
Interactive Web-Chat	1
Integrated Contact Center Management (CRM)	4
Contact Center Reporting System	6
Knowledge Management System	5
Multi-Channel Queuing of Email & Web Chat	3
Multi-Site Call Routing	5
Outbound Predictive Dialing	5
Remote/Virtual Agent Support	4
Skills-Based Routing	7
Unified Voicemail Messaging	5
VoIP (Voice over Internet)	3
Workforce Management System	6
Other	0

8. What is the number of users/agents on your primary contact center platform?

	Respondent Average
Number of users/agents	239

9. Please estimate the number of man weeks required to evaluate, select, and negotiate a contract with a new vendor/provider of contact center hardware or software.

	Respondent Average
Less than 4 weeks	0%
4 to 8 weeks	4%
9 to 12 weeks	36%
13 to 16 weeks	10%
More than 16 weeks	50%

10. Please estimate the time required for a contact center administrator to learn a new admin interface for a hardware or

	Respondent Average
Less than 2 weeks	30%
2 to 4 weeks	58%
5 to 6 weeks	12%
7 to 8 weeks	0%
More than 8 weeks	0%

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11. What is the total number of people administering the systems in your contact center operations?

	Respondent Average
Number of people administering your systems	12

12. What is the number of people (administrators) within the contact center who get trained on each new product installed in the

	Respondent Average
1 - 3 people	40%
4 - 6 people	46%
7 - 10 people	6%
10 - 15 people	2%
More than 15	6%
If more than 15 people, please enter #	17

13. What is the number of people gathering, analyzing, and reporting operations and performance data in your contact center

	Respondent Average
Number of people gathering, analyzing, and reporting	8

14. Given the choice, if you could get all needed functionality from one vendor or multiple vendors, which would you choose?

	Respondent Average
Single integrated-solution vendor	66%
Multiple point-solution vendors	34%

15. Do you feel that all-in-one platforms have become more attractive or less attractive solutions over time?

	Respondent Average
more attractive	65%
less attractive	7%
the same	28%

16. Does your CTO / IT department favor all-in-one platform solutions or specific point solutions?

	Respondent Average
Strongly favors all-in-one platform solutions	24%
Inclined toward all-in-one platform solutions	20%
Neutral	43%
Inclined toward specific point solutions	8%
Strongly favors specific point solutions	4%

17. Do you consider the ability to blend contact center agents and enterprise/business users on one telephony system an important

	Respondent Average
Yes	78%
No	22%

18. What kind of calls does your call center handle?

	Respondent Average
Only inbound calls	52%
Only outbound calls	4%
Both inbound and outbound (blended) calls	44%

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19. How many inbound calls per year are directed to your contact center?

	Respondent Average
Calls offered annually	1,521,946
Calls handled annually (live agent plus by IVR)	1,429,307

20. How many outbound calls are made per year by your contact center, including return calls to inbound callers?

	Respondent Average
Outbound calls per year	480,986

21. How many Emails are directed to your contact center per year?

	Respondent Average
Emails received annually	282,169
Emails handled annually	282,169

22. How many Faxes are directed to your contact center per year?

	Respondent Average
Faxes received annually	18,623
Faxes handled annually	18,532

23. How many Web-Chats are directed to your contact center per year?

	Respondent Average
Web-Chats handled annually	0

24. What percentage of your total contact volume is handled by part-time agents?

	Respondent Average
Percentage handled by part-time agents	11%

25. What percentage of your total contact volume is handled by self-service?

	Respondent Average
Percentage handled by self-service	30%

26. Of all your self-service contacts, what percentage is completed through the following self-service channels:?

	Respondent Average
IVR	53%
Fax-back	1%
Web site	25%
Email	10%
Kiosk	0%
Other	11%

27. Does your center outsource any calls or emails?

	Respondent Average
Yes	21%
No	79%

28. What percentage of your total calls/emails do you outsource?

	Respondent Average
Percent outsourced calls (inbound)	38%
Percent outsourced calls (outbound)	31%
Percent outsourced emails (inbound)	31%

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29. Does your contact center operation consist of: (Choose one response.)

	Respondent Average
Single location within the U.S. (Jump to question 32)	22%
Single location outside of U.S. (Jump to question 32)	16%
Multiple locations	62%

30. If you operate from multiple locations, how many locations for each choice below?

	Respondent Average
Locations within the U.S.	54%
Locations outside the U.S.	46%

31. If you operate from multiple locations, how is your operation and networking administered?

	Respondent Average
Centralized administration	74%
Distributed administration	26%

32. How many agents work in your contact centers?

	Respondent Average
Full-time agents	202
Part-time agents	25
Full-time Equivalents (FTEs)	214
Full-time agents	229
Part-time agents	72
Full-time Equivalents (FTEs)	265

33. If you use remote agents, please indicate the percentage of remote agents for each of the following choices:

	Respondent Average
Percentage of your full-time agents	2%
Percentage of your part-time agents	0%

34. What percentage of your total contact volume is handled by part-time agents?

	Respondent Average
Percentage handled by part-time agents	19%

35. What percentage of your total inbound contact volume is handled by self-service?

	Respondent Average
Percentage handled by IVR	55%
Percentage handled by Automatic Fax-back	3%
Percentage handled by Web site (FAQ's, etc.)	26%

36. Does your call center generate sales revenue?

	Respondent Average
Yes	74%
No	26%

37. What percentage of your inbound calls give rise to up-sell/cross-sell opportunities?

	Respondent Average
Percentage of inbound calls	31%

38. What percentage of your up-sell/cross-sell opportunities result in a sale?

	Respondent Average
Percentage of inbound calls	21%

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