opinion piece

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The Role of Presence in the Contact Centre

Contents

Presence in the contact centre

Overview

Workforce management is a key focus area for improving the efficiency and responsiveness of any contact centre – and presence can add significant value by enhancing the call routing process. By extending the available set of responsive resources to those outside the immediate contact centre environment, and by enabling ad-hoc location of resources with specialist skills and expertise, call routing can be made to better serve both customer requirements (for service) and business imperatives (for efficient use of resources).

The role of presence in the contact centre

Presence is not a new concept in the contact centre – routing calls based on resource availability is an integral part of any sophisticated operation. This ensures the right calls get to the right agents.

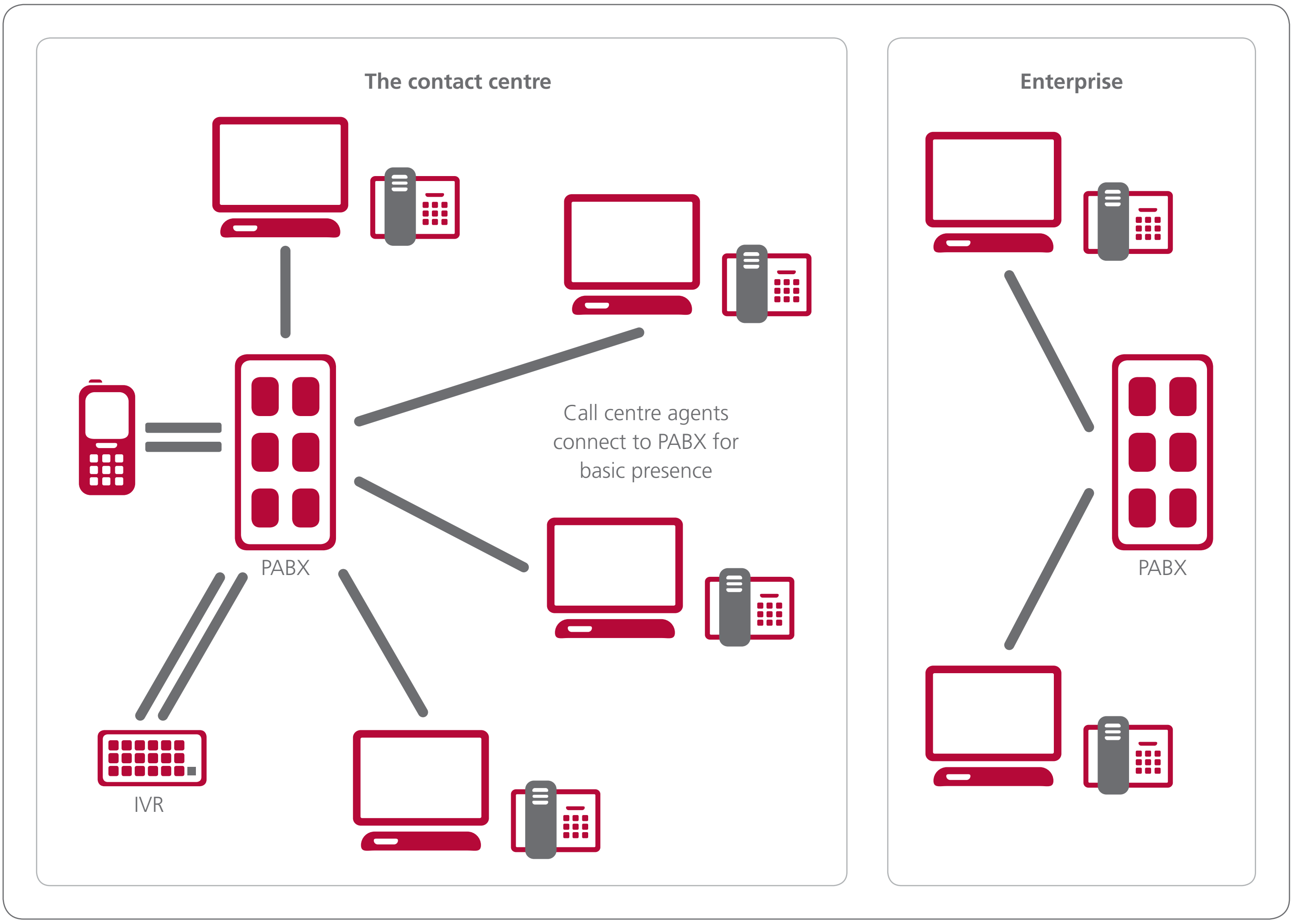
Presence can also improve customer service by providing quicker response times to queries. For instance, if a customer urgently needs to reach their account manager, rich presence information allows that call to be routed to the salesperson's current location rather than to their voice mailbox.

To date, however, this has involved presence information based on agents being logged into proprietary Automated Call Distribution (ACD) systems – typically implemented as part of the underlying telephony system. This requires agents to be logged onto their phones and, using a skills/resources registry, calls are routed to available agents based on the type of query.

This provides the basis for skills-based routing to optimise the time and effort required to manage an outcome for incoming customer interactions.

This traditional approach suffers from the following drawbacks:

- Presence information can be somewhat limited
- It relies on expensive, proprietary systems
- It does not easily allow for utilisation of resources outside the immediate call centre
- It is focused around a single interaction channel – the telephone



Utilising Microsoft® Lync™ Server 2010 for presence

A more flexible approach is to implement a software infrastructure that can act as a presence platform across a range of applications and channels and be utilised by resources both in the contact centre and across the organisation.

Leveraging Lync Server 2010 to implement a presence platform has the following benefits:

- Provides rich, extensible presence information
- Easily integrates into multiple channels and back-end systems
- Available for use by both the contact centre and the extended enterprise resource pool outside the contact centre

There are a number of ways in which presence, through Lync Server 2010, may be integrated into the contact centre, ranging from simple client presence awareness through to presence integrated with existing telephony and contact centre applications.

Integrating presence into the contact centre

Traditionally, a limited form of presence management was part of the telephony hub that forms the basis of the inbound call centre – agents logging into the telephony system.

A number of possibilities exist for the integration of presence into the contact centre, based on the level of automation required and the richness of integration with existing workforce and knowledge management systems.

Simple agent presence

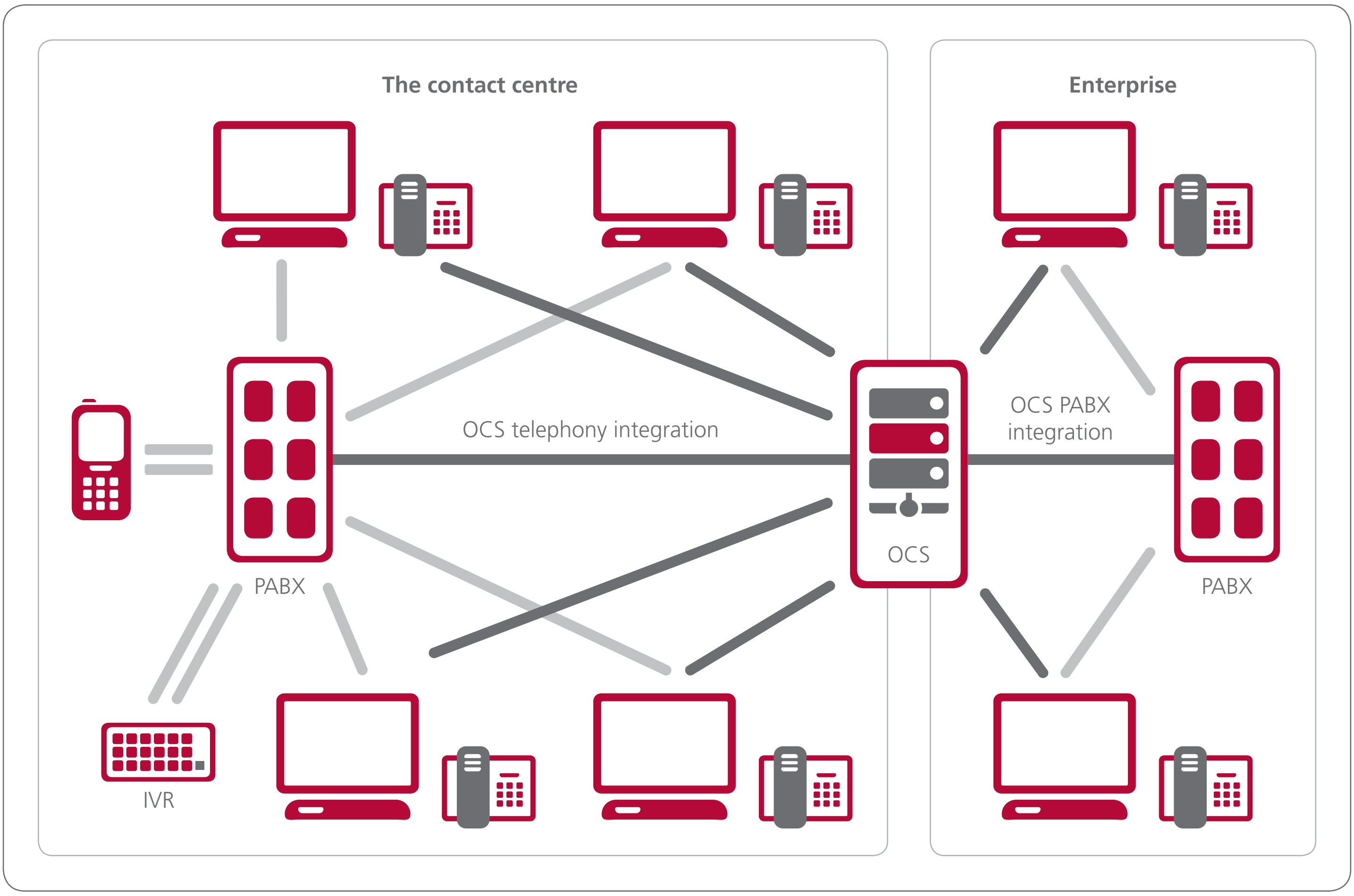
A straightforward starting point is to implement Lync Server 2010 as the presence infrastructure in the contact centre, and enabling access by contact centre agents to the Lync Server 2010.

Lync Server 2010 can provide rich presence information simply through interaction with contact centre agents and other relevant resources in the enterprise through the Lync client on agents' PCs.

The Lync client software is distributed to the agent PCs. Agents are able to manage their presence status, such as 'available' or 'busy', through the client.

While this is relatively simple to implement, its success relies on agents setting their presence status, and adequate identification of the agent information to ensure proper call hand-off, or referral to the right subject matter expert.

One advantage is that agents may use Instant Messaging (IM) to contact other available resources while they are on the phone with a customer, potentially avoiding transferring calls around the call centre. A more significant advantage is that contact centre agents may interact with other resources located elsewhere in the organisation, and non-contact centre workers with cyclical workloads, or subject matter experts, may be able to help resolve calls indirectly.



Presence integrated with telephony

The next level of sophistication involves integrating Lync Server 2010 with the contact centre telephony system to provide automated levels of presence, and services such as 'click-to-dial' to simplify the effort required by contact centre agents to manage their presence and to transfer calls around the centre.

This level of integration means that Lync Server 2010 will detect agents as being on a call or on a conference contact automatically, without client intervention. This means that call routing decisions, and access to resources, will be more accurately managed.

What is required for this level of integration is influenced by the telephony system operated within the contact centre. The mechanism to integrate Lync Server 2010 with existing PABX systems will vary depending on the type of PABX – usually specialist middleware software is used to integrate traditional PABXs, while VoIP PABXs may incorporate components to allow the integration of Lync Server 2010 directly.

Presence integrated with contact centre systems

The final level of integration sees Lync Server 2010 interoperating fully with all the contact centre's systems. Lync Server 2010 can provide encrypted and fully-logged transactions between internal users and external IM clients; real-time communication capabilities from within Microsoft Word, Excel and other Office applications; enterprise-grade unified communication solutions for single sign-in, data recovery and compliance with audit and regulatory requirements; and more. Public Internet Connectivity for Lync Server 2010 also provides customers with the security of contacting a corporate identity in an otherwise anonymous Internet.

Real-time application creation (ideally using .NET as a development platform) means existing third-party applications can be made presence-aware, and integration with Lync Server 2010 enables a range of extended and enhanced communications-related functions, including transfer of calls between numbers and networks (e.g. from a multi-party IM session to a PSTN-based conference call), full integration with the corporate telephone system, and video communication capabilities.

In this scenario, Lync Server 2010 will ideally be deployed as part of a Microsoft Unified Communications initiative, streamlining integration and optimising interoperability.

Presence scenarios

The ability to quickly bring the right resources and skills to bear on a customer call is critical to a contact centre's success. The way this is achieved may depend on how much information is known about the caller and its requirements.

If this information is not available, or if ad-hoc requirements surface during a call, agents may need additional resources. In such situations, the agent needs the ability to locate the best resource available to assist the caller.

This expertise may exist within the contact centre, where advanced presence may supplement methods that require agents to be logged into the telephony system. Utilising Lync Server 2010 for presence also allows for agents not logged into the telephony system to be located, based on their presence status.

Further, the addition of advanced presence that is integrated with (rather than being part of) the contact centre telephony system allows additional resources to be accessed. Users located outside the contact centre, but still within the organisation, may access the same presence infrastructure – extending the pool of specialist resources without the need for them to be dedicated to the contact centre, which would incur additional costs.

Presence has a role to play in these scenarios – which are outlined in more detail below.

Locating the right resource for the call

The expertise locator is a tool that displays presence information against a list of relevant expertise holders – typically used when ad-hoc assistance is required.

A call that is being managed by an agent may require additional information, or a decision or intervention by someone else within the business. Often, these people are not stationed at the contact centre but elsewhere in the organisation. Spending time tracking down an available resource with the right expertise is not an option when a call is underway. Lync provides you with the ability to search across both the corporate directory and Outlook contacts, which can contain external or specialist names, job roles or company information of a permanent or ad-hoc nature.

This information may be displayed within the normal Lync client or on a page within a web portal displaying relevant information the agents use as part of their job. The expertise locator is not limited to specific personnel; rather, it uses role definitions to determine who can service requests for information.

Assistance/advisory call

Where a call centre agent needs to talk to a supervisor or to a lead agent who is not connected or logged into the queue.

The agent requires assistance with the call that is in progress. By knowing who is available to help with the specific subject at hand, the agent can make the call or even conference in the subject-matter expert to help resolve the call. This also includes audio or IM monitoring by a supervisor to provide real-time coaching and information.

Escalation

Where an agent needs to escalate a call to a resource that is not logged into the contact centre queue.

The required resource may work within the contact centre or the back office but the contact centre agent does not necessarily have direct knowledge of who they are. For example, a complex call to the Tax Office may need to be escalated to a senior advisor. These specialists are only rostered to handle queries for small parts of their day so it is important that the agent knows to which resource they can transfer a call, what knowledge the resource has and whether the resource is available.

Specialist call

Where an agent needs to locate an advisor with specialist information who may be available at a remote location.

Many financial institutions are moving away from appointing generalist branch managers in favour of specialist advisors; to better service their customers' needs. For example, an institution may have a loans advisor, an investment advisor, an insurance advisor and so on. An agent takes a call from a customer and completes part of the enquiry but then needs to find a specialist to help with the next step of the call.

The agent needs to find that person within the organisation – and a simple telephone list is not sufficient (and may well be out-of-date). It may be further complicated in that the caller may wish to speak to someone from their own geographic area.

In these cases, a contact centre agent will need to know the expertise, location, and availability of the particular advisor. Where these advisors move from site to site (for example, a mobile advisor with a regular regional 'beat'), then location is a critical part of the presence information required by the agent.

Back office task follow-up

Where an agent needs to determine the progress or status of an ongoing customer query.

Follow-up customer calls can be both costly and difficult to complete with high customer satisfaction, as customers often wish to contact specific agents who may not always be available. Allowing agents to contact otherwise unavailable colleagues to identify the status of follow-up activities can greatly enhance call completion and customer satisfaction levels.

The agent needs to be able to see who has that task in the back office processing area to follow up for the customer. To resolve this query (for example, a bank loan application), task allocation information must be combined with presence information. These calls can be difficult as callers typically wish to know when their matter or query will be approved or completed – so they will continue to call back. It is therefore crucial that the contact centre agent be able to contact the relevant back office personnel to resolve the call.

Summary

While the range and complexity of calls into contact centres continues to rise, there is great focus on reducing operating costs and retaining a loyal, profitable customer base by optimising the processes to manage calls. Presence has an important role to play in this. By combining presence, status, expertise and task allocation information incoming calls can be resolved faster, repeat calls reduced on customer satisfaction levels enhanced.

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