# OpenSpan for
# Contact Centers

**openspan**

# OpenSpan for Contact Centers

## OVERVIEW

This paper highlights a number of common contact center challenges that OpenSpan addresses, including the need to improve agent productivity and performance without sacrificing customer service quality and ultimately customer retention. Additional topics discussed include increasing up-sell and cross-sell revenues, improving data integrity, and ensuring compliance. This paper is intended for the following audiences:

:: Executives and managers responsible for contact center and customer service operations.

:: IT executives and staffs that support contact center organizations.

:: Business analysts that focus on contact center process improvement.

:: Service providers and software vendors that provide solutions to the contact center industry.

## EXECUTIVE SUMMARY

OpenSpan helps to improve the performance and productivity of contact center agents and other customer-facing staff by eliminating the complexity associated with multiple disjointed applications, complicated user interfaces, and cumbersome and repetitive business process workflows.

The core capability of the OpenSpan Platform is the ability to automate manual workflows within applications or that span multiple, previously un-integrated applications. Once automated, contact center agents can shift more of their attention to servicing customers instead of repetitively logging into applications, navigating applications to find customer data, copy-and-pasting data into multiple systems, logging call notes, and relying upon notes or their own memory to present up-sell offers or comply with government, corporate or client mandates.

The OpenSpan Platform has been deployed to more than 120,000 enterprise desktops and will enhance more than 1 billion customer interactions during 2009 alone. Customers report an average savings of $1 million annually for every 1,000 agent desktops deployed with OpenSpan software.

## CHALLENGES ADDRESSED

A disconnect often exists between corporate and contact center organizational goals and the tools provided to individual agents to deliver these objectives. At a corporate level, contact centers are often measured against customer satisfaction and customer retention rates. As a cost center, contact centers are constantly under pressure to improve customer service quality while minimizing costs. Nowhere else is the mantra of "do more with less" more prevalent than within the contact center.

Contact center key performance indicators (KPI) also include average handling time (AHT), first call resolution (FCR) and similar objectives tied to agent productivity and immediate customer service quality performance. In sales-oriented centers, up-sell and/or cross-sell revenues are also an important metric. Increasingly, compliance mandates are being tracked as violations that can lead to substantial fines.

The challenge that agents and their managers face is that the tools provided rarely support their KPI objectives. A recent survey by Velociti Partners showed that the average customer-facing employee in the financial services industry uses 7 to 8 applications on a daily basis to resolve customer issues. Not only are agents forced to learn and interact with many applications but these applications often operate as un-integrated silos of computing. For an agent, this means even simple business processes require manual and repetitive workflows that slow average handling times and impact the ability to resolve customer issues in an effective manner. And the challenge is actually getting worse, from merger mania to new IT initiatives to a seemingly never-ending supply of new applications being deployed to already crowded and complex agent desktops.

## INTRODUCTION TO OPENSPAN

OpenSpan is not another new application. Instead, OpenSpan helps contact centers improve the performance and productivity of agents using the applications and systems already in place. With OpenSpan, you can quickly integrate applications, automate tasks and workflows that span multiple applications, add new functionality to applications and improve applications' user interfaces.

Technically, the OpenSpan Platform injects into software applications and enables developers to easily expose application functionality as re-usable components. If an application already does this through APIs, OpenSpan will leverage them. If an application does not have APIs available or if you lack ownership of the application's code (such as software-as-a-service or partner applications), OpenSpan enables you to easily create an interface to the needed functionality without accessing or modifying the application's source code. It's all done via a point-and-click interrogation technique.

OpenSpan's approach means that virtually any application can participate in a productivity-enhancing solution. From applications hosted on users' desktops to mainframes to server-side applications (e.g. .NET or Java-based) to Web and software-as-a-service application hosted in the cloud, every application can now be improved to support your contact center needs or included in a workflow automation to drive huge productivity gains.

## OPENSPAN FOR CONTACT CENTERS

The OpenSpan Platform is ideally suited for a contact center environment where improvements to agent productivity and performance can have a dramatic impact on the bottom line. Below are a number of common use cases that demonstrate the value that OpenSpan can deliver to a contact center.

### Automate Workflows

OpenSpan enables you to automate manual workflows within an application or across a set of applications. Here are some popular examples:

- **Automate application log in procedures.** Eliminate the requirement for agents to repetitively log in to multiple applications throughout their shift.

- **Automate navigation of applications for each call from CTI.** Eliminate the need for agents to navigate CRM or other applications for each inbound call. When an agent accepts a call from CTI or softphone application, OpenSpan will automatically navigate a CRM (or other) application to the appropriate customer record, saving the agent time and improving customer satisfaction.

- **Automatic synchronization of customer data across multiple systems.** Eliminate cumbersome and error-prone copy-and-paste tasks by automatically synchronizing customer data changes across all relevant systems. For example, if an agent changes a customer phone number in a CRM application, automatically populate the phone number change across billing, provisioning, shipping and other relevant systems.

- **Log chat or e-mail conversations and automatically add to customer records.** Parse service tags or service requests from support-based e-mail or chat systems and attach to customer records in your CRM (or other) application.

- **Automate knowledgebase navigation.** Based upon data entered into a CRM (or other) application, automatically navigate a knowledge management system. Conversely, automatically log knowledge base inquiries made during a customer interaction directly into that customer's record in a CRM (or other) application.

- **Automate call notation.** Eliminate the time-consuming manual process of adding call notes to a CRM (or other) application at the conclusion of a customer call by automatically logging relevant events that occurred during the course of the call (e.g. data changes, shipment notification look ups, billing inquiries, up-sell offer acceptance or denial) to a customer record. Events can also be logged to multiple applications.

- **Automate delivery of real-time up-sell or cross-sell offers.** Automate lookup and presentation of customized up-sell offers. Offers can be presented to agents through their existing applications at the appropriate stage of the call. Add an acceptance or denial check box to ensure proper tracking and real-time reporting of up-sell performance.

## Case Study

**WIRELESS TELECOMMUNICATIONS PROVIDER**

A leading telecommunications provider automated several time-consuming manual processes including a process that previously required agents to copy-and-paste customer record changes across multiple applications. All OpenSpan solutions were developed and deployed by a small IT team and with a minimal services investment in only 4 months. As a result, they expect to save in excess of $27 million annually by reducing average handling times by over 9 seconds per call.

## Improve User Interfaces

Agents are required to learn and utilize many different applications, each with its own user interface and navigational structure. OpenSpan provides several different options for streamlining user interfaces to simplify agent training, improve productivity and arm agents with rapid access to customer data to drive customer satisfaction gains.

:: **Access data stored in multiple applications from a single application.** Minimize the number of applications that agents need to learn and use by enabling them to access relevant customer data from a single application user interface. For example, extend your CRM application's user interface to access and present customer credit information from a financial application, shipment information from a shipping application or overnight delivery confirmations from a Web-based shipping company's Website.

:: **Build a new composite application that provides a 360 degree customer view.** Aggregate customer data from multiple applications and present via a new composite UI. Enables an agent to interact with a single application instead of many.

:: **Add dynamic call scripting.** Create a new composite user interface or dashboard organized in such a way that it visually walks an agent through a desired process/call flow while simultaneously interacting with existing applications behind the scenes. A script or visual process flow can be altered dynamically based upon information collected during the call.

:: **High-value customer alerts.** Automatically alert agents visually to a high-value client based upon any pre-defined criteria. Alerts can be presented through any existing application.

:: **Add tool tips to existing applications.** Extend a UI by adding tool tips that provide additional information or step-by-step directions for a particular business process. Add reminders within the application to improve process adherence and simply training for new agents.

## Case Study

**CALL CENTER OUTSOURCER**

A contact center outsourcer (BPO) leveraged OpenSpan to build a series of composite applications to simplify processes for their agents. As a BPO, the company supported multiple clients, each with its own business processes and supporting applications, none of which could be directly modified by BPO provider. The company utilized OpenSpan to build a series of composite applications, each designed to visually walk an agent through a desired call flow. As a result, new agent training has been reduced and agents are more easily transferred from one client to another. Average handling times have also been significantly reduced.

## Add Real-Time Compliance Capabilities

OpenSpan enables you to add new functionality to existing applications. Often this is important for compliance purposes, tracking agent activity and reporting or preventing unauthorized activities.

:: **Track and report real-time compliance violations.** Track every agent's activity within every application accessible on the desktop, log compliance violations and/or report violations to managers. For example, identify when agents improperly change credit limits, issue credits above a pre-defined limit or copy sensitive customer data to another application. Configure OpenSpan to track or report virtually any activity within a single application or across a set of applications.

:: **Add data masking to an existing application.** Because OpenSpan allows you to easily add new functionality to an existing application, you can prevent pre-defined user groups from accessing sensitive data within an application that previously allowed it.

:: **Prevent unauthorized activities.** Similar to data masking, OpenSpan enables you to prevent particular user groups from accessing application functionality. Instead of just reporting a compliance violation, you could prevent it from occurring at all. For example, eliminate the ability for an agent to increase a credit limit above a certain dollar amount or disable a "submit" button to prevent an agent from completing an unwanted transaction.

:: **Ensure process adherence.** Similar to the above examples, prevent an agent from proceeding with a particular business process until all pre-defined steps have been completed. For example, prevent an agent from closing out a case until call notes have been added to the customer record or prevent an up-sell process from continuing until a locally-specific disclosure statement has been read to the client.

## Case Study

**MAJOR RETAILER SALES DESK**

This company extended its existing Amdocs Clarify CRM application to better support government compliance regulations. Previously, the company had little insight into whether customer service representatives (CSRs) were reading locally-specific disclosure statements to potential clients. Now, with OpenSpan, CSRs are prompted with a dialog box containing the proper local disclosure statement, based on customer address, during the proper stage of the call flow. CSRs cannot continue with the transaction until they have confirmed that the statement has been read. OpenSpan also logs acknowledgements in the CRM system, providing the retailer a formal compliance audit trail.

## THE OPENSPAN ADVANTAGE

OpenSpan helps improve the performance and productivity of contact center agents and other customer-facing staff by eliminating the complexity associated with multiple disjointed applications, complicated user interfaces and cumbersome and repetitive business process workflows.

The OpenSpan approach is very different than alternative technology approaches for a number of reasons:

:: **Rapid and highly iterative development process.** OpenSpan features a point-and-click, visual design environment for rapidly building productivity-enhancing solutions. Build an automation, for example, and deploy it to agents to realize almost instant benefit, then build additional solutions. You can avoid large-scale projects that take months or years to complete.

:: **Very low services investment.** OpenSpan offers a product approach to solving complex integration and automation challenges instead of a services-heavy alternative.

:: **Include virtually any application.** OpenSpan's unique injection technology enables you to include virtually any application accessible by an agent in any OpenSpan solution. This includes desktop applications, closed applications without APIs, partner or client applications and Web applications hosted in the cloud.

:: **Highly complementary to SOA strategies.** OpenSpan provides the last mile of SOA. First, OpenSpan can extend any of your existing legacy applications to become consumers of Web services. Develop a Web service and almost instantly consume that service within your existing application set with OpenSpan. Additionally, OpenSpan can expose any automation as a Web service. This means you can now service-enable processes that require desktop applications, allowing you, if you choose, to move older legacy applications off the desktop once and for all.

## GET MORE INFORMATION

OpenSpan initial projects alone can deliver huge productivity improvements and significant cost savings; subsequent projects rapidly pay for themselves. Browse other OpenSpan case studies, white papers and online demonstrations by visiting www.openspan.com.

**⟲openspan**