

OpenSpan® for Contact Centers

TABLE OF CONTENTS

OVERVIEW, EXECUTIVE SUMMARY	2
CHALLENGES, INTRODUCTION TO OPENSAN	2
OPENSAN FOR CONTACT CENTERS	3
THE OPENSAN ADVANTAGE	5
GET MORE INFORMATION	6

Overview

This paper highlights a number of common contact center challenges that OpenSpan Desktop Analytics and Desktop Automation software can address, including the need to improve agent productivity while elevating customer service and managing costs. Additional topics discussed include increasing up-sell and cross-sell revenues, improving data integrity, reducing training requirements, lowering attrition 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

The OpenSpan Desktop Analytics and OpenSpan Desktop Automation products represent a complete process improvement solution for contact centers. These two components enable contact centers to accelerate agent performance and deliver on critical management priorities, including customer satisfaction, revenue achievement and cost management. OpenSpan Desktop Analytics allows contact centers to capture application activity from the agent desktop to discover how agents interact with applications while performing tasks. OpenSpan Desktop Automation software is used to develop and deploy process improvements that improve agent productivity.

OpenSpan eliminates the complexity associated with multiple disjointed applications, complicated user interfaces, and cumbersome and repetitive business process workflows. Once processes are streamlined, contact center agents can focus on building rapport with customers rather than manipulating the technology on the desktop. They will spend less time repeatedly logging into applications, navigating systems to find customer data, copying-and-pasting data across multiple screens, logging call notes, and relying upon notes or memory to present sales offers or comply with regulatory or corporate mandates.

OpenSpan desktop analytics and automation products are superior because they represent an end-to-end process improvement toolset that makes performance solutions rapid to develop and deploy. OpenSpan's unique and powerful technology gives contact centers a significant advantage by providing a codeless, graphical development environment that works with virtually any agent desktop application, including legacy systems, green-screen mainframe applications, Windows desktop applications, enterprise systems, Cloud applications, and more.

OpenSpan has been deployed to more than 200,000 enterprise desktops and enhances more than 1 billion customer interactions a year. 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.

OpenSpan for Contact Centers

OpenSpan 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.

- **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.
- **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.
- **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.
- **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 simplify 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.** OpenSpan enables you to prevent compliance violations or unauthorized user actions by specifying and controlling the application functionality available to users. For example, you might limit field access to prevent agents from increasing a customer credit limit above a certain dollar amount. Or disable an onscreen control, such as a “submit” button, to prevent undesired actions.
- **Ensure process adherence.** Use OpenSpan automations to prevent an agent from moving forward in a process until all required 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 specified disclosure statement has been read to the client.

Case Study

MAJOR RETAIL 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 of contact center agents and other customer-facing staff by eliminating the complexity associated with multiple disjointed applications, complicated user interfaces and repetitive business process workflows. There are many advantages to the OpenSpan approach:

- **Rapid time-to-solution.** OpenSpan’s visual design environment is the fastest, most powerful way to build productivity-enhancing solutions for the contact center. Build and deploy your first automations in just days to realize immediate benefits. Then continue your process improvement initiative with additional solutions that further improve agent performance.
- **Minimal services requirement.** OpenSpan offers a technology-centric solution for complex integration and automation challenges in the contact center, not a services-heavy approach.
- **Leverage existing application investments.** OpenSpan’s unique technology enables you to monitor, analyze and automate virtually any application accessible by an agent, whether it is mainframe, client/server, Windows desktop or cloud. By leveraging existing applications in your process improvement efforts, you can maximize the returns from previous technology investments.
- **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.
- **Reduce attrition and other costs.** By simplifying the user interface, making processes more intuitive, adding process guidance, automating tedious manual processes, and eliminating unnecessary steps, agent training time can be shortened. These steps also minimize opportunities for error and costly compliance violations. Finally, improving the user experience leads to a reduction in attrition, a factor closely linked to rising costs in the call center.

Get More Information

If you would like to learn more about OpenSpan, we invite you to contact us directly via phone at 1.678.527.5400 or e-mail at sales@openspan.com. Our team of process improvement specialists will be glad to assist you in determining how OpenSpan can be of value to your organization. They can also arrange an online or in-person demonstration of OpenSpan.

Additional resources are also available on the OpenSpan website at www.openspan.com and www.openspan.com/community.



Copyright © 2011 OpenSpan,
Inc. All rights reserved.

OPENSAN GLOBAL HEADQUARTERS
4501 NORTHPOINT PARKWAY
SUITE 140
ALPHARETTA, GA 30022
USA

GENERAL INQUIRIES (INTERNATIONAL)
+1.678.527.5400
1.877.733.1136
FAX: +1.678.527.5401
SALES@OPENSAN.COM