

# CONTACT management

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May/June 2007

## How safe is your customers' data?

Plus

- Remote-based agents
- Inbound software product showcase



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welcome to  
the human network.



Cover photo: Roberto A Sanchez

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# Staffing, offshoring, theft and more

What's your contact centre's number one challenge? John O'Grady, partner, Prism Economics and Analysis, is sure you'll answer that it's your staff turnover. In his presentation earlier this year at Contact Centre Canada's Technology Roadmap workshop, he noted that this sector's staff turnover rate at 40 percent is double that of the average rate of all industries. He sees this challenge as putting pressure on labour costs, undermining the ROI on training, affecting performance, altering the validity of location calculations and requiring new HR and other organizational strategies. This issue features the first in a series on hiring remote agents. And, SwitchGear Consulting offers a recipe for cooking up a base of loyal staff.

We also look at outsourcing and offshoring, although O'Grady sees this as a topic that has already been getting unwarranted press attention. He contends that since contact centres in finance, the public sector and health care account for 47 percent of Canadian industries served, and since these industries have a low propensity to outsource or offshore for privacy and other regulatory reasons, Datamonitor's estimate of 89 percent of centres being in-house will continue to hold. O'Grady also reported that there is a strong desire to control the HR dimension of those people who deal with customers. Further, too often cost savings did not materialize among those who did outsource.

Another topic that attracts media coverage is the contact centre's fallibility with regard to identity theft. Recent research from Cisco Systems reveals that corporate officers responsible for network security don't worry as much as they used to about computer viruses and unauthorized access. Now, theft of information and regulatory compliance are their top concerns. Check out this issue's feature and gauge how easily your centre could fall victim to insidious social engineering tactics.

And, when did your centre's agents last get trained on providing crisis communication during an incident of some sort? It should be every quarter, suggests Darren Jones, the technology risk director at Protiviti Canada which provides independent internal audit and business and technology risk consulting services.

He finds that with other than those contact centres associated with healthcare or first level emergency response, "it's not too much of a stretch to see that there's a significant gap in being prepared to answer questions like 'should I be coming in to work or accessing email?'"

Jones says these gaps in emergency preparedness and business resumption management occur not because contact centres are dropping the ball but because the corporate sponsors have allowed this gap in their business continuity strategies. It's one of those issues that can somehow just slip off the radar screen. Don't let it.

Susan Maclean  
Editor



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Publisher  
Steve Lloyd  
steve@contactmanagement.ca

Editor  
Susan Maclean  
susan@contactmanagement.ca  
Marketing Information Coordinator  
Adam Lloyd  
adam@contactmanagement.ca

Creative Director  
Susanna Ferguson  
susanna@contactmanagement.ca

Advertising Sales Manager  
Mark Henry  
mark@contactmanagement.ca

Senior Account Manager  
Sean Foley  
sean@contactmanagement.ca

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[www.contactmanagement.ca](http://www.contactmanagement.ca)

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## next issue...

**JULY/AUGUST** – Getting operations and IT teams in sync, capturing and building on your centre's best practices, IVR/speech/VoIP showcase, regional profile on Manitoba/Saskatchewan

**SEPT/OCT** – Key industry trends, shifting to a profit model, customer survey/feedback product showcase, Atlantic Canada

...SURVEY REVEALS CSAT AND QA GAP...

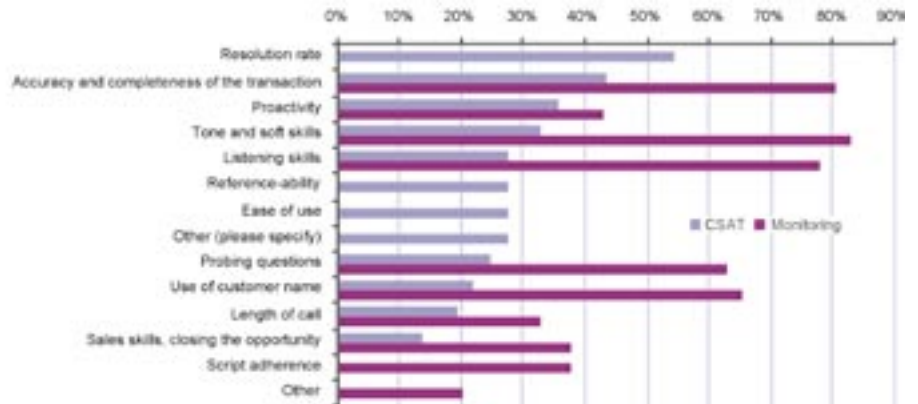
The average call centre has up to a 40 percent variation between their internal measure of quality (quality assurance – QA) and their external measure (customer satisfaction – CSAT), according to a survey prepared for ICSA-Toronto Chapter by The Taylor Reach Group, Inc.

“The data suggests that in fact customers think we are better than we think of ourselves,” reports Colin Taylor, chairman & CEO of The Taylor Reach Group Inc., an international call and contact centre consulting and advisory firm. Where QA is the measure of what we *think* is important to the customer, CSAT is what *is* really important to the customer, he notes.

However, he points out that most programs involve reviewing one to six calls per agent per week. “If the average agent handles 80 calls per day then we only review 1.5 percent of their calls, how likely are we to uncover defects in quality?” he queries.

He also sees it as “critical that centres measure CSAT to reduce the variance, and include all channels.”

The online survey conducted last December with more than 40 participants from North America and beyond included respondents from small single sites with



less than 20 agents to very large multi-site operations. A dozen questions focused on monitoring, CSAT and voice of the customer programs and practices.

Most (56 percent) were inbound centres and 39 percent were blended inbound and outbound. Phone calls were the predominant type of work done at 98 percent of the respondents while emails ranked a close second at 90 percent.

**Highlights of the findings are:**

- of the 58 percent of respondents doing internal QA/agent monitoring, 31 percent monitor eight or more transactions a month per agent, 28 percent do

two or three and 19 percent four times;

- those scores were most published and distributed 76 percent of the time and mostly (25 percent) in the centre and to direct and senior management
- 41 percent of centres reported a 10 to one ratio between agents and QA/monitoring staff, 22 percent a 20 to one ratio, 11 percent a 30 to one and, surprisingly, eight percent a 40 to one and 150 to one
- 48 percent of respondents do an external CSAT and only 25 percent measure agents by CSAT
- those CSAT results are published and distributed by 50 percent of the respondents within the centre, 36 percent to senior management, and 14 percent to direct management
- among 33 percent of respondents who had a voice of the customer program, direct management supervisors and senior management both receive audio feedback 35 percent of the time, and agents directly only 22 percent. **cm**

...INFOR TO ACQUIRE WORKBRAIN...

Toronto-based Workbrain Corporation announced in April that Infor Global Solutions European Finance, S.A.R.L. will acquire all of Workbrain's outstanding common shares, pursuant to a statutory plan of arrangement. The transaction values Workbrain, on a fully diluted basis, at approximately \$227 million dollars.

Workbrain claims to provide the most widely deployed web-based workforce management solution for large enterprises. The company is the only provider of Total Workforce Management that helps organizations plan, deploy, and manage their workforce to reduce costs, increase sales, and boost employee satisfaction. Clients such as British Airways, General Mills, Target Corporation, and Lifespan choose Workbrain's industry-focused workforce management solutions to integrate workforce planning, labour forecasting, workforce scheduling, time and attendance, and

workforce analytics on a single platform.

“In just over seven years, Workbrain has built the leading workforce management software company based on innovation and attention to the customer. Joining Infor will accelerate our current momentum by providing us access to Infor's 70,000 customers and extensive global distribution network. We believe that all of our stakeholders will benefit from this combination,” said David Ossip, CEO of Workbrain.

With global headquarters in Alpharetta, GA, Infor is the world's largest private software company and third largest enterprise software provider. It provides applications that run virtually every aspect of a business, from enterprise resource planning to supply chain, customer relationship management and financial systems. Infor focuses on business-specific solutions, which require less customization, provide more functionality and result in lower cost of ownership. **cm**

...SECTOR COUNCIL HOLDS AGM IN JUNE...

Contact Centre Canada announces it will hold its annual general meeting in Montreal at the Centre de recherche informatique de Montréal (CRIM) on June 20, 2007. Details will be posted at the end of May at [www.contactcentrecanada.ca](http://www.contactcentrecanada.ca). “We encourage all of our industry partners to attend this outstanding networking event.”

The sector council will be posting to that website an upcoming report on The Implications of Current Trends on Human Resources. The report is scheduled to be available late spring 2007. **cm**

...NEW AVAYA SUITE TARGETS MIDSIZE FIRMS...

Avaya Inc. announced in April global availability of a complete contact centre suite built expressly for midsize businesses. Customer Interaction Express is described as a full-featured contact centre software suite that works with virtually any communications system, including Avaya Communication Manager, to help simplify integration and implementation. The solution is said to handle all incoming and outgoing customer transactions across multiple media channels, including phone, e-mail, fax and text messaging for mobile devices. Its call routing and reporting capabilities are said to enable corporations with up to 150 contact centres agents at multiple locations to use intelligent communications to deliver consistent, personalized service to customers.

Other capabilities include automated self-service and outbound campaign management.

The software application, along with Avaya Meeting Exchange Express conferencing solution, also announced in April, extend the capabilities of Avaya's portfolio for midsize businesses, which currently includes Avaya IP Office, Avaya MultiVan-

tage Express and other Avaya Communication Manager-based offerings.

"Customer service plays a key role in gaining competitive advantage, and companies of all sizes recognize the benefits of enhancing customer care," said Mona Sultan, analyst at Datamonitor. "Market trends toward advanced service technologies, including self-service and multimedia, can be expected to continue across industries and business market segments."

Customer service is the killer application for IP telephony because of its ability to connect what was disconnected – the contact centre agent from the rest of the enterprise, says Tracy Fleming, National IP Telephony Practice Leader at Avaya Canada. Where cost avoidance was at first the primary driving factor for VoIP, now the appeal is leveraging the technology to tie in business processes for service time savings and other benefits to customers.

IP telephony reduces enterprise delay by removing human latency through automatic triggers, he adds. It enables unified communications which brings together desktop and collaboration, messaging,

conferencing, mobility and speech access.

To get significant benefits—such as disaster recovery—and the biggest bang for the dollar, look at the contact centre first, he says he advises companies. "You can expand the contact centre footprint to Vancouver, Montreal, Beijing – wherever. You're not just reducing long distance costs. You're connecting business units. You're communicating and engaging decision-makers." **cm**

...SOFTWARE LETS YOU DO CHANGES ON THE FLY...

Contact centre managers constantly struggle with performance and technology issues like system downtime, data security and the need to create and modify scripts and processes quickly and easily. With the April upgrade of its VoiceNet contact centre management software, Interactive Softworks based in Leesburg, VA, claims to help overcome those challenges.

VoiceNet is said to offer full inbound, outbound and blended multi-channel contact centre capabilities, as well as routing, data management and reporting functions. The new VoiceNet version 5.2 enhancements are designed to improve system productivity, simplify system maintenance and facilitate integration with existing IT resources.

Interactive Software claims the built-in web services extensions make for easy integration with companies' legacy systems, third-party services and customer data systems. VoiceNet's web-based management portal allows for comprehensive reporting capabilities and integration with Microsoft's SQL reporting services. The script publishing wizard is said to facilitate script replication and can automatically publish changes to child scripts based on changes made to a single master script.

Based on a Microsoft SQL platform, VoiceNet 5.2 includes VoIP support, a .NET scripting engine and support for the newest Dialogic cards and drivers. The Microsoft SQL data source gives agents faster data access and report processing, and it also eliminates many indexing, security and redundancy issues in other database types, according to Interactive. **cm**

...NICE ANNOUNCES SOA FRAMEWORK SOLUTION...

NICE Systems earlier this year introduced NICE SmartCenter which is designed to enable organizations to manage their contact centres in an insightful proactive manner and take action at the right-time. Described as leveraging the synergies of the combined capabilities of NICE Perform, IEX TotalView and Performix, the new product is said to provide a holistic view of contact centre operations and business insight into market and customer dynamics. These capabilities are unified within an open Service Oriented Architecture (SOA) based framework which Nice is enhancing to provide improved sharing of information and business processes and investment protection.

NICE SmartCenter is described as placing the contact centre at the heart of the enterprise. Contact centres running the software are said to gain a single view of their business, improve efficiency, effectiveness and quality of customer service while better align their objectives with

the enterprise. The SOA-based framework allows centres to benefit from the spectrum of NICE SmartCenter best-in-class solutions – compliance, quality management, workforce management, interaction analytics, coaching, customer feedback and performance management. The open SOA-based architecture provides for sharing of information and business processes, while allowing the solutions to evolve independently, protecting existing technology investments, claims NICE.

Jim Davies, principal analyst at Gartner, states: "Contact centres and enterprises today face multiple challenges in bridging the gap between technology and business goals and processes. They need to support ongoing and dynamic business activities, deal with integrating various systems, consolidate share and reuse information between different structured and unstructured data sources, and ensure scalability and flexibility while protecting investments." **cm**

# Keeping your customers' data safe



Consumers are increasingly wary of their personal information being stolen. How safe is your centre keeping it?

BY SUSAN MACLEAN

Although contact centres daily take customers' personal data over the phone, the industry has not acknowledged that identity theft is as big of a problem as it is in other industries. Security has typically been a matter of trying to keep one step ahead of the criminal element rather than bolting the barn door after the horse has been stolen. But in this case, many barn owners don't seem to be aware they have a horse worthy of being stolen.

"Identity theft is as big a potential problem in the contact centre as it is in any other industry where personal information is routinely gathered and used in service of the customer," notes Paul Stockford, president and chief analyst of Saddletree Research in Scottsdale, AZ. "To date, this is a bigger issue than most realize."

He reports that Saddletree Research believes that individual customer identity protection will only grow in importance through the rest of this decade.

Unfortunately, the criminal element has twigged that contact centres are a source of confidential information. Tom Aiello, vice-president of Worldwide Sales & Marketing for Envision Telephony, Inc., recalls seeing a news clip on this topic on the British Broadcasting Corp. while in Great Britain last fall. According to the broadcast, employees coming out of contact centre premises in Scotland and Ireland have been being followed and threatened

with bodily harm if they did not obtain and supply names and personal information they had access to.

The timing of that newscast was last fall when Envision had just launched its Identity Protection solution which it claims is the first such software to provide contact centres with "a secure, cost-effective and seamless technology to protect sensitive customer data captured in the millions of customer-agent interactions that occur daily."

The Envision software is designed to protect personal data that could include date of birth, social security number, driver's license number, or their financial identity through a credit card, bank account and phone-card numbers. The solution is said to reduce corporate risk of costly identity theft and brand erosion.

"There are so many areas of potential loss of identity and in many cases it is an overlooked area," Aiello stresses. "When you call a toll-free number and you hear 'this call may be recorded for quality purposes' at some point that recorded clip is going to be replayed. First it will be by an analyst alone and then again with an agent who will sit and listen and review it."

Such recorded clips—whether they are audio or audio and computer screens—typically have a lot of information: an address, a date of birth, a social security number, credit card information, etc.

Aiello says Envision asked many existing customers "if we built a way of muting that part of the voice and that part of the screen on replay, would you want it?" The response was "absolutely!"

By deploying Envision's Identity Protection software, enterprises can protect personal information within quality coaching and business intelligence applications. The software is also designed to help Envision's contact centre customers meet the regulatory guidelines for personal data protection, privacy and safety within the contact centre.

The Identity Protection software requires that contact centres run Envision's Quality Monitoring software. Aiello said there are no plans to extend the ID protection to run with any other company's software.

"Saddletree Research believes that Envision Telephony has performed two services for the contact centre industry with the introduction of Envision Identity Protection solution," Stockford noted. "First, it is bringing to market a timely solution to a rapidly growing and extremely important problem. Second, Envision has set a standard for the industry relative to the security of customer information in the future."

## Preventing security breaches

Hackers often look for the easiest way to see **identity theft** page 8

access what they want,” notes Mark Dowd, a principal security architect at McAfee, Inc. “Why bother attempting to break a complex multi-tiered security solution when the user of the machine can be easily tricked into allowing an unauthorized person access to the machine?”

“Social engineering attacks have been very popular with hackers in the past, and they aren’t going away any time soon,” he adds. “They enjoy an alarming success rate. If anything, social engineering has expanded into a semi-technical discipline as well.”

Dowd reports that “phishing” attacks have become big business and will continue to grow. “Phishing involves sending emails that lure users into visiting spurious web sites that are set up to look like legitimate ones. Then, the fake sites con users into disclosing sensitive information. Although many of these sites might have a name that is just a slight variation on the real sites they are impersonating, attackers have also exploited browser behavioral quirks to aid in their phishing efforts. One very popular methodology is URL bar spoofing, in which the link displayed in the URL bar of a browser is not where the browser is really directed. A web site could, for example, contain a link that displays [www.americanexpress.com](http://www.americanexpress.com) in the URL bar but it is really interacting with the site [www.malware.com](http://www.malware.com).”

“Security is part of all processes,” says Brian Bourne, president of CMS Consulting Inc., a Toronto-based five-time Certified Microsoft Gold Partner with a focus on security.

He suggests that while stealing customer identities from a data point of view is no different in a contact centre than from any company, what is different is that social engineering is amplified. “Social engineering is the ability to trick someone into giving you information,” he explains. “For example, they may give enough basic information to get the rest.”

Training against social engineering is vital. The first step is to make people aware of it. Some phishing types – like an email asking for your bank account password are obvious and known. But, Bourne warns that a seemingly friendly greeting card may actually be a back door into

the receiving computer to gain ownership of that computer and its level of access. “With these log-in privileges, it becomes an insider attack. It could be accidental.”

Once inside, that illicit interloper may

### CREATING A LAYERED DEFENCE

Here’s defence in depth to help keep your customers’ information safe. “At each level there are a number of vendors of products,” says Bill Bourne, president of CMS Consulting.

#### Data

have strong passwords, access controls, encryption, backup and restore strategy

#### Application

input validation, Layer 7 firewalls

#### Host

operating system hardening, host-based firewalls, authentication, update management

#### Internal network

network segments, machine isolation with IPSec, intrusion detection and prevention Systems

#### Perimeter

firewalls, boarder routes, email gateways, virtual private networks (VPNs) with quarantine procedures

#### Physical security

guards, locks, tracking devices

User level policy, procedure, awareness – user training, secure operational procedures, acceptable use policy, security policy

“It’s easier to get budgets for security when it is part of a project – and it is better practice anyway to build security into any IT project up front,” Bourne advises.

have put in other “back doors” to gain illegitimate entry.

Staving off such security breaches requires a multi-layer defence in depth approach. (see sidebar)

Protecting the information is one thing. What happens when defences fail is another.

### Responding to an incident

So what should you do if someone penetrates the defence and steals the horse in

spite of your efforts? At first, surprisingly, nothing! Just as you would leave a crime scene alone so evidence is not tampered with or damaged, Bourne says you need to keep away from the computer that has been compromised.

Perhaps the breach is a misuse of privilege such as a system administrator reading a boss’s email or sending a price quotation to a competitor. Even if you don’t want to go to court, you need evidence collected so you can fix the defence mechanism that failed. You need to know what happened so you can remediate it. And, you may have a legal obligation to contact the customer.

You need a plan and training on how to handle these things. Hopefully you will have already created a Computer Security Incident Response Team (CSIRT) to deal with security incidents. Otherwise, typically as soon as it is discovered you have had an incident, the reaction is to panic and then start immediately cleaning up and shoring up defences again. But, that damages the evidence, warns Bourne. “You don’t let people walk through a crime scene. Stop anyone doing that now, even though you are exposed and are feeling a sense of urgency to resolve it right away,” he counsels. “I can guarantee the attacker has been in there for months or years.”

If you can afford to have your system down, you could unplug a network cable right away. Otherwise, it requires the specialized skill and tools of a CSIRT professional who will know how to collect evidence.

Provided the machine hasn’t been touched, a CSIRT professional can piece together indicators such as last access or modified time stamps, the creation of additional files, intrusion detection logs and other evidence to find out what is missing, if something has been copied and so on. If something was copied and the program is finished, the fact that it ran would be in the memory of the machine until another program ran or it was shut off.

Every time you touch a computer, things change in the memory. “If people don’t have a plan for a security breach or incident, it makes our job very difficult,” says Bourne.

Incidentally, Bourne says the CSI actors

**Saddletree Research believes individual customer identity protection will only grow in importance through the rest of this decade.**

never do computer forensics right. They always touch the keyboard first thing. That's like trampling across a crime scene.

**Educate your staff**

Above all, security awareness training for all staff is crucial, he stresses. Make sure they know how social engineering works and to be on guard against it.

For example, they should not share passwords and log in information during friendly "smokers' corner" conversations even though someone seems to be simply interested in being helpful. Or someone might claim to be phoning from the IT department and perhaps offer to update the workstation's program but first needs the password. "Most people give passwords to anyone who asks," says Bourne. **cm**

*Additional resources*

*CMS Consulting Inc. president Brian Bourne is also a founder of Toronto Area Security Klatch (TASK), a free Canada-centric resource for Canadian professionals interested in security, compliance and regulations. The group has members (membership is free) across Canada but meets monthly at the University of Toronto. It also provides many free resources on its web site at [www.task.to](http://www.task.to). TASK is planning a conference Nov. 20-21 at the Metro Toronto Convention Centre which Bourne says will be unique to Canada for its depth and security focus. Details at [www.sector.ca](http://www.sector.ca)*

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# How to find and evaluate an outsource option

**Here's how an organization can improve the odds of building a successful outsourcing relationship.**

BY COLIN TAYLOR

A lot of steps and activities need to be taken regardless of whether the service will be provided domestically, in a 'near shore' location (Canada) or offshore.

You will be creating problems for yourself by moving forward with outsourcing until you can answer "yes" to each of these questions.

- Are your service transactions a one-off or are they part of a broader on-going customer relationship?
- What are the risks to the customer relationship associated with off-shoring? From the company's perspective? From the customers' perspective?
- Can these risks be mitigated?
- Are we willing to accept these risks and the worst case scenario to save approximately 15 percent?
- Have we optimized our existing internal operational model?
- Is our technology the best possible to support the delivery of service?
- Do we have the right people with the right skills delivering service today?
- Do we have the appropriate training and development in place to grow and develop our staff to deliver ever improving service?
- Are operational metrics aligned with the goals and objectives of the company?
- Do we have the resources and appropriate knowledge internally to source, implement and manage an outsource provider?
- Do we possess a network and IT infra-

structure that can support extension to an outsource provider?

Now with your 'yes' answers in hand you are ready to move forward to source an outsource partner.

## Assessing experience

Take all statements related to experience and knowledge with a grain of salt. Ask the vendor specific questions related to their experience such as;

- Which companies in your vertical have they worked with?
- Are they still working with these companies? (and if not, why not?)
- Can they provide reference contacts at these firms?

Based on their answers you may have to ask yourself if you want to work with an experienced firm or if you want to be a guinea pig.

Of course even if the outsourcer has experience in your vertical it doesn't mean that they are good at it or even that this is a core competency. You will want to ask them:

- What percentage of their business (in terms of dollars, minutes or seats) is in the same vertical as you operate in?
- What types of services have they provided to that vertical?
- What awards or recognition have they received for their work in the sector? Of course they could do very good work and have received no awards or recognition, but if they have received awards,

etc., then you can know that some third party assessed their work or submission and felt that it had merit.

## Checking on staffing

It is essential that you understand the staff who will be working on your project. You need to know the following:

- What skills and competencies do they look for when hiring staff? Be wary of anyone that only or primarily looks for call/contact centre experience as this often just hires someone else's problems.
- How do they test for these skills and competencies? The tests should be objective and independent of the interviewers' subjective opinion. Ask to see these tests.
- What is their annual staff turnover and how is this calculated? This can include 'churnover' – those that leave the contact centre but are still with the company. Turnover should include staff from the first day they are on the job. Be wary of companies who don't include 'churnover' or who don't include the training period or the first X days in their counts.
- Ask if you can interview and/or speak with some of their staff.

## Evaluating training

You need to understand how your potential outsource partner approaches staff training; not just the product knowledge, but also the soft skills related to effective communication, sales and agent development. Specifically, you should ask:

- To see their agent training program (agree

to sign an NDA if requested). This shows how they invest and equip new staff before they go on a program such as yours.

- To see any tests or assessments they complete to ensure comprehension and recall of trained knowledge.
- If there is a training outline for a client's program similar in nature to yours. They should remove identifiable elements.
- How will your training be done? Will they train all of the staff, will you train the trainer or will they expect you to train all of the staff?

### Management processes

You need to understand how the outsource partner will manage your business. Specifically you need to understand:

- The key metrics or KPI's they employ in managing their business from a macro level.
- What are the specific metrics they believe your program should be governed by? Asking this question before you provide your desired metrics speaks volumes about their perception of your project and requirements.
- Who will manage your business? Will they assign a project manager? Where is that manager located? Are they dedicated to your account? How will you interact with them: phone, email, face to face, instant messaging, etc.? What are the response parameters you should expect? Ask them to provide an SLA to respond to your phone calls and emails. Ask to see a bio or resume for the project manager. Ask for references for the project manager. This person will be an extension of your company; you should be very comfortable with this person before agreeing to proceed.
- What reporting type and frequency will they provide you? Ask to see sample reports and ask if they can produce 'ad-hoc'

reports and how quickly they can do so

- Ask for a standard implementation project plan.

### Gauging technology

Any outsourcer you partner with will need to integrate with your systems and processes. It is important to understand both their structure and knowledge levels. Specifically:

- Ask to see their disaster recovery plan.
- Are their telephony and power systems redundant and to what level?
- How do they envision connecting into your systems? How they connect and the security around the connection are going to be very important to your own IT group.

### Assessing pricing

This is often the only element that companies look at closely. Those that do this, do so at their peril. Before you select a vendor you need to understand their pricing model and how it would apply to your project. Specifically you will want to know:

- What is the basis for their pricing model? Is it per connect minute, per talk time minute, per call, staff FTE's etc.
- Are there discounts or price breaks based upon volumes? We know that there are economies of scale as a business grows; to what degree do they share this with their customers?
- What are the set up or establishment fees and what are these charges for? Some companies charge for training, opening a file, reporting set up, telecommunication set up, data connectivity set up, etc.
- What other fees are there and when would they apply? Do their rates, for example, include long distance and, if not, what is the 'per minute' rate they charge you? Can the long distance or toll charges be billed directly to you by

your existing carrier? Are there charges for additional reports and what are these fees?

- What service level guarantees are they willing to offer? Are the service levels targets or requirements? More than one company has been burned by thinking that a target service level meant that it would be consistently achieved as opposed to something to strive for.
- What is the measurement period for the service level? There can be significant variances in actual service delivered if it is measured on a daily, weekly or monthly basis.
- What penalties and recovery periods will apply when a service level is not achieved?
- What contract terms are they seeking and what benefit do you receive for a longer agreement? It is generally in the client's best interest to not have a blanket escalation rate but rather an increase/decrease tied to an independent measure such as 'cost of living,' etc.

### General checks

Always do the following:

- Visit the contact centre where your business will be completed.
- Be concerned if they tell you they do not have a centre for you today.
- Check references. Check a minimum of three current clients. Ask to speak with former clients as well.
- Do a credit check on the company.

With the proper preparation, any company can navigate these potentially dangerous waters and develop effective and meaningful partnerships. **cm**

*Colin Taylor, chairman & CEO of The Taylor Reach Group Inc., also has location specific advice. ctaylor@thetaylorreachgroup.com; (905) 426-5055*

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# Foreign legislation makes offshoring complex

**Cost savings are not the only driver when considering outsourcing to offshore operations. Buyers are concerned with global events and rightfully so when incorporating offshoring as part of their strategic plan.**

BY SEAN HALVERSON

The ever-increasing development of legislative actions from world governments and the amount of provider knowledge and ability to comply are becoming factors buyers of offshoring services are considering in signing new deals. With recent laws enacted and amendments to existing ones, managing only the service levels and not contributing with innovation for the constantly changing government conventions, can be the difference between a signed contract and buyers seeking contract termination.

Legislative factors have become somewhat complex. Legislative actions such as the Securities Exchange Commission's Sarbanes-Oxley Section 404 and Canada's Securities Administration MI 52-111, both pertaining to governance and accountability for internal controls, have become well known during the last batch of outsourcing deals between the US and Canada. These legislative actions have cost publicly traded companies billions of dollars to comply with, yet there are still buyers and providers who do not fully understand the difference between a SAS70 Type I and a Type II audit. With the SOX July 15, 2007, mandate around the corner, companies are continuing the struggle towards compliance after

having just gone through the motions of an audit and not understanding the value created. Because of these compliance issues, the buyers are expecting providers to be an integral part of the design and testing of internal controls, as well as the operating effectiveness between the two parties.

Another example of legislative impact is India's F.No.500/67/2003-FTD enacted by the Ministry of Finance Central Board of Direct Taxes for BPO units operating in a captive environment, under a multi-national company (MNC.) Though critics argue this amendment is somewhat ambiguous, unsure buyers are requesting further explanation when considering establishing BPO operations inside India. Several other developing economies are taking measures to decrease risk with the intent to attract greater amounts of foreign direct investment with similar legislation, and at the same time are becoming more attractive than the more known offshoring destinations for small-scale operations. This requires providers to become experts by increasing awareness around destinations that have not been historically known as marketable solutions for offshoring.

Buyers are paying attention to host governments in the country of their cur-

rent outsourced operations by relying on the government's effectiveness and ability to fully understand impacting legislation from a buyer's standpoint. Buyers are also interested in how these governments will stay attractive as premier destinations before investing millions of dollars in establishing operations abroad.

Buyers expect that the provider will also contribute to formulating the strategy around these factors. Items open for discussion can range from Canada's B-10 recommendation from the Superintendent of Financial Institutions to India's newest version of the second Amendment Act of 2002 for company insolvency.

Buyers are going to look beyond which provider has the economies of scale and ability to deliver at a lower price. They have learned from their previous deals that the landscape has changed from doing it faster and cheaper than my competitor can through offshoring, to understanding the impact associated with legislative actions, corporate-governance regulations, and host government actions being equally important to cost savings during deal negotiations. **cm**

*Sean Halverson, a senior consultant with Alsbridge, has managed offshoring initiatives in Malaysia, Costa Rica, Slovakia and India, and has experience in outsourcing bid and engagement.*

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# Meeting staffing needs with offsite workers

BY SUSAN MACLEAN

**Datamonitor predicted in 2005 that 7.5 percent of the North American contact centre workforce will be sitting outside the traditional centre by 2009. Now that estimate seems conservative. Here's part one as we check out what's real and what's hype about this much discussed phenomenon.**

Attracted by the ability to eliminate overhead costs, some companies have chosen to hire only remote workers from day one, paying them by the hour or by the call. Some are gradually shifting to that model, lured by the promised flexibility of matching staff to company needs, even in half-hour increments.

"It's a changing environment," says Kim Naar. "Companies are expected to be available more often to customers 24/7 and it's expensive to provide that availability. A remote-based workforce is all about flexibility and filling in when an employee might not like to work—like the midnight shift, weekends and holidays—with remote agents who might not mind working those times."

Naar is product marketing manager for Contact Centre Solutions at Telus and is promoting the Telus AgentAnywhere service introduced last December. That service consists of the Telus ContractXchange for remote agent recruitment and the Telus CallCenterAnywhere network technology. It uses the LiveXchange security technology with its AgentAccess operating system and LiveXchange management technology that includes RealTimeXchange, ConferenceXchange, ScheduleXchange and agent notify.

Brian Pritchard is seeing growth in his company in the shape of a hockey stick. Pritchard is CEO and president of LiveXchange, a Canadian remote agent certification company targeted exclusively at the contact centre industry. His business enables companies to reach what he claims is a huge base of people interested in working from home – a growing pool of people who are ready to start training.

Someone interested in becoming a remote-based agent fills

out a full resume at [www.ContractXchange.com](http://www.ContractXchange.com) and then goes on to the certification stage for a typing skills test and a voice assessment. While that is going on, their computer is also tested for applications that might interfere and the speed of the Internet connection. The quality of the headset is also checked. When the person meets the requirements and becomes fully trained, he/she is added to the pool of certified agents.

Although the number of agents actually working on contracts through LiveXchange was around 800 at press time, he reports there are more than 13,000 registered members through his [www.ContractXchange.com](http://www.ContractXchange.com). These members are either certified or becoming certified. Significantly, their number has almost tripled in the last year.

"Canada is starting to catch up to the U.S. where they've been doing it since the 1990s," he says. Pritchard was an executive vice-president at the U.S.-based remote agent recruiter Willow CSN which has since changed its name to Arise. He returned to Canada in 2001 and began LiveXchange the following year. Now he is in both the U.S. and Canada with LiveXchange. He says there's no border in the remote agent world where American companies have Canadian agents and vice versa.

"For Canada, it is a huge win with the volume of work we're able to bring here to communities where there are no jobs," he says. "It is attracting business to come here."

Partnering with LiveXchange for its remote network and technology resources, the Telus AgentsAnywhere service includes tools that address the typical issues that concern traditional centre executives, says Naar.

"One of the questions that comes up," she explains, "is 'how

do you meet and keep in communication? With tools that enable conferencing and real time exchanges, it seems as though agents are there in the office. Webcams are also a great tool.”

Quality monitoring by recording voice, screen and via webcam, as well as coaching software is available through the Telus platform as well.

Security is another issue that she says has been addressed by their LiveXchange partner. A person contracted as an agent receives a Linux-based operating system on a boot up disk which takes over their computer and restricts them from using any other application. It also has fingerprint scan security embedded in the log in and allows live video monitoring.

Companies seeking remote-based agents post their jobs at Telus Contract Xchange. Agents check that online site and apply. Hirers can review the agent’s resume and listen to the audio test. If they are interested in hiring that agent, they could either set up an online interview or hire the agent then and there. The hired agent would be directed to an online training site.

“Rather than a full-time employee, you’ve got a flexible contract, you’re not dealing with a union – and there’s no need for the expense of overhead,” Naar stresses.

Contact centre outsourcers in the U.S. have a lot of home agents, Pritchard says, but adds that the agents do not have a direct relationship with the hiring corporation, which he sees as the big advantage with LiveXchange. “Canadian companies want to control the work environment and quality of work. The outsourced home agent is scary for them.” Through LiveXchange, companies contract directly with the agents.

“The U.S. has gone unbelievably aggressive over remote,” says Pritchard. “In Canada, as awareness spreads, the technology is less expensive and becoming more readily available.” **cm**

*So who are these remote agents? And what are some companies’ experiences? We’ll cover that next issue.*

### Ask Afshan

Afshan Advises is a new advice column service *Contact Management* is offering with Switch-Gear Consulting’s Afshan Bye. Send your questions or problems to [susan@contactmanagement.ca](mailto:susan@contactmanagement.ca) and Afshan will advise. We’ll run an anonymous sample of the Q&A in the next issue.

### We want your opinion!

*Contact Management* invites your opinion for our Sept/Oct issue when we highlight the industry’s key trends. Please go to the survey link at [www.contactmanagement.ca](http://www.contactmanagement.ca) before June 30 and let us know what trends and issues matter most to you. The Taylor Reach Group Inc. will compile your responses which we’ll publish this fall. Thanks for your participation!

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# Gaining the full benefits of inbound software

**Advances in communication technologies and applications bring new benefits to contact centres.**

BY DUANE SHARP, P. ENG.

Optimizing and achieving the highest levels of quality and revenue, while maintaining cost controls, are primary objectives of the modern contact centre. Accomplishing these objectives requires the proper mix of technology, management and operational controls – a combination which can be particularly daunting for small and midsize contact centres which face unique challenges. These organizations need a combination of technologies and applications designed to address their operating environments without sacrificing functionality, while at the same time providing the same capabilities as the larger contact centres, that is, a full range of capabilities.

Most business organizations have come to recognize the contact centre as a primary source of maintaining and enhancing customer relationships, functioning as a gateway to customer interactions, with the capability and expectation of generating revenue. To meet expectations corporations have for their contact centre operations, whether they are internal or external, the demands placed on cost, the delivery of quality and, ultimately, of revenue, require constant re-examination and re-tooling of the operational model to ensure that the best technologies and applications are in place.

In this article we examine inbound software and related systems which provide contact centres with flexibility in managing calls and other customer interfaces.

## Optimizing contact centre performance

One of the greatest contact centre challenges is responding to fluctuating traffic through optimal agent availability and task allocation. Many contact centres today struggle to meet spikes in demand or utilize idle resources when traffic drops.

These challenges arise due to unpredictable events, such as when a server goes down. Similarly, a power failure or burst watermain can quickly generate high call levels for a utility company.

As queue times rise, customers become frustrated and companies experience high levels of abandoned calls. On the other hand, over-scheduling agents raises costs and creates agent dissatisfaction as they sit idle or perform less valuable tasks. Another challenge is matching interaction types to each agent's unique capabilities. Some contact centre agents are expert at handling inbound calls, while others are equally comfortable handling inbound and outbound calls. Still others prefer to handle only non-voice channels such as e-mail, web chat and instant messaging (IM). Having agents focused on one interaction creates imbalances whenever a particular interaction channel peaks.

One of the most recent communication technologies to become a major technological element of many contact centres is Voice over Internet Protocol (VoIP), one of the numerous applications spawned by the Internet. VoIP technology has changed the face of the inbound contact centre because it enables contact centres to operate from any global location, leading to the concept of the virtual contact centre. One Canadian supplier of contact centre technology notes that 95 percent of the systems the company ships are IP systems.

Spanlink Communications, Inc. is one systems integration company which offers a VoIP solution for contact centres, working with its customers to design and implement VoIP-based unified communications systems.

While many companies upgrade legacy phone systems to IP-PBX, Spanlink finds that 75 percent of companies duplicate

what they did previously, that is, they upgrade from 10 PBXs to 10 IP-PBXs, missing the opportunity to improve contact centre capabilities. Spanlink encourages its customers to consider optimizing a new VoIP-based contact centre because architecting a system using older automatic call distribution (ACD) architectures does not provide enhanced business value.

If corporate objectives require that customers receive a localized sense of customer service, Spanlink will optimize their inbound call routing systems to best fit customer service needs. The company's ACD can be structured to route calls to the nearest facility in which the call is coming from. As well, Spanlink can architect ACDs to recognize where a call is coming from, evaluate questions that have come from this number in the past, and route calls to a specific knowledge worker. For example, if required, this feature enables callers to speak with specialists within a particular department.

Interactive voice recognition (IVR) systems are another area in which Spanlink works with customers to improve performance. A properly-architected IVR provides significant benefits to a contact centre. Advances in speech recognition technologies are revolutionizing caller interfaces. However, the fundamental requirements remain the same. The system enables easy, integrated access to live agents and, by mapping questions accordingly, contact centres can reduce costs and provide a high level of customer service.

Another supplier of contact centre solutions, Aspect Software, Inc., also focuses on VoIP and traditional voice-based products and services for customer service, collections and sales and telemarketing business processes. The company recently announced an alliance with Microsoft to deliver a solution targeted at small and midsize contact centres. The initiative will provide Microsoft Office Communi-

cations Server 2007 Speech Server as an embedded component of the Aspect Unified IP product.

This inbound software solution incorporates an automatic call distributor, a voice portal, quality management, a predictive dialler and Internet connection in a single application, providing unified reporting, routing and administration functionality, as well as hosted capabilities with multi-tenancy – all while running on the customer's transport of choice: either VoIP or time-division multiplexing (TDM).

### Simplifying training

Cincom Systems claims its Synchrony product serves as a single interface to allow agents to handle multiple interactions across multiple channels simultaneously, eliminating the necessity of agents learning numerous applications. The company promises to enhance customer communications across all channels, including telephony, e-mail, chat, fax, web collaboration and call-back.

Cincom claims its unified agent desktop enhances productivity and simplifies training to provide a consistent customer experience across all touch points. Agents see a complete landscape of the customer – across all relevant channels – and use the same knowledge base, the same contact and activity management tools, the same scripts and resources, and most importantly, the same handling process across different interaction types.

The Synchrony platform includes a smart screen pop-up, universal queuing and intelligent routing, a self-service portal and an agent anywhere feature.

### Building customer loyalty

Aeroplan is a Canadian-based loyalty and marketing company developed in 1984 by Air Canada for the purpose of creating an incentive program for its frequent flyer customers, and which has grown into one of the leading Canadian-based loyalty programs, with many different partners in a variety of business sectors. The company that provides the contact centre solution which has contributed to the success of the Aeroplan program, is Genesys, a division of Alcatel-Lucent, and a major supplier of voice recognition systems.

## Using older automatic call distribution architectures does not provide enhanced business value. Advances in speech recognition technologies are revolutionizing caller interfaces.

Aeroplan pursued an aggressive growth plan focused not only on attracting new members, new partners and new products, but also retaining existing ones, resulting in a significant growth in both the partner and membership base, with 15,000 calls per day, amounting to over four million calls being handled in the contact centre annually and over half of all rewards being claimed via the web site [www.aeroplan.com](http://www.aeroplan.com).

The Genesys voice recognition solution (IVR) enabled Aeroplan to improve its overall customer experience in several ways: provide a range of self-service options; focus on customer satisfaction by providing 24/7 customer service; improve security and ease access to member information; reduce opportunities for fraud; offer multi-channel integration; inform agents where customer was in speech application during transfer for live assistance; and keep customer accounts active. Other features of the IVR enable agents to streamline and optimize customer service; maximize use of the agent skills and work modes; handle a range of customer inquiries; monitor customer service more strategically; and establishing new key performance indicators.

As Brian Rowland, Aeroplan's director, customer service technology and member experience notes, "Genesys has enabled us to deliver to our customers a level of

service we can be proud of. Without the technology implemented in the call centres, and on the web, we simply would not have been able to achieve this."

When implemented, the technological advances described in this article can facilitate several important changes in the way agents manage customer contacts, for example, enabling them to be fully utilized across a range of different customer interactions. Traffic management can be based on current conditions and automatically adjusted between self and assisted service, as well as by regulating inbound and outbound activities. External events and value-add opportunities can automatically generate proactive notifications to customers.

Businesses are increasingly expecting the contact centre to operate as a successful profit centre, while controlling costs and maintaining high levels of customer service. As a result, contact centres are abandoning the "status quo" in favour of a new way to manage fluctuating traffic, resources and business outcomes, using the advances in traditional contact centre technologies, such as inbound software. **cm**

*Duane Sharp is an electronics engineer and the author of numerous articles on technology, as well as handbooks on customer relationship management and call centre operations.*

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# FedEx fits service to customer need



BY PATSY BERTOIA

FedEx has become a household name thanks in large part to our dedication to customer service. Frederick W. Smith founded Federal Express in 1971 for the sole purpose of finding a faster, more efficient method of delivering packages and airfreight for customers. Now known as FedEx, that same customer-centric focus prevails in the company today.

One area of the company where the focus on customer service is especially pronounced is in our call centres. In Canada, FedEx has call centres in Toronto, Montreal and Vancouver that handle more than 20,000 customer calls daily. Ensuring that we help resolve each and every one of those customer issues in a fast, efficient manner is paramount to maintaining our positive brand image.

Thankfully, our call centres have a great

*“A customer whose cat slipped into a box just before she sent it off for shipping has very different needs from a customer curious if his package will arrive at its destination before Valentines Day.”*

customer resolution track record which is a direct result of our realization that a “one size fits all” approach does not work. A customer whose cat has slipped into a box just before she sent it off for shipping has a very different set of needs from a customer who is curious about whether his package will arrive at its destination before Valentines Day – and we need ways to properly address both.

However, finding ways to connect customers with the right resources is not a simple or easy process. Just as Frederick

W. Smith spent considerable time analyzing shipping routes to determine the best way to design a shipping system for faster delivery of airfreight, we take the same careful, analytical approach to designing customer-centric call centres.

## Inbound call routing

Like many call centres, we employ an automated information menu that a large portion of our customers use to find basic information from billing to package location. To service customers with more complex needs, we designed an infrastructure that carefully matches callers with service agents based on availability,

level of knowledge, language capabilities and other characteristics.

This approach helps us efficiently provide the majority of our customers with one call resolution, meaning that the first agent customers speak to can generally provide them with all the information they need.

We relied heavily on partnerships with technology and telecommunications providers to help us develop this system, since the deployment and management of highly specialized technology falls outside of our core expertise.

Our famous 1-800-GoFedEx toll free service in Canada and North America is supported by AT&T and includes a number of important network-based features that we have leveraged to streamline our call centres. This includes an Intelligent Call Management (ICM) feature offered by AT&T which helps us determine where to best route customers, based on an algorithm FedEx created.

With this intelligence, we can connect a French-speaking customer concerned about whether the contents of her package will pass safely over international borders to the first French or bilingual agent with experience in cross-border shipping issues. This saves customers from the frustrating and time consuming experience of being transferred between agents or being forced to call back.

The AT&T Contact Center service also provides us with routing capabilities that help distinguish our call centres systems from many others in the industry. Instead of routing callers into a single call centre to wait for the next available agent or transferring callers to a queue at another call centre, our system puts all customers in the same queue and matches them to agents regardless of the agent’s location.

Using the example above, that same French-speaking customer would be routed to the first French-speaking agent with international shipping experience,

regardless of whether they are based in Montreal, Toronto or Vancouver. This helps us significantly shorten wait times for customers and make more efficient use of our call centre resources.

This same routing capability also helps us continue to service customers should a switch at one of our call centres fail. For instance, if our call centre in Toronto experiences technical problems, our customers are automatically routed to agents at either the Vancouver or Montreal centres, minimizing the impact on customers.

This level type of "always-on" availability is essential to delivering the best customer service possible, which helps us maintain high customer satisfaction levels.

### Satellite agents

Although technology is a major factor in the design of our intelligent, customer-centric call centres, we also take great measures to consider intangible factors that may affect service levels, such as agent job satisfaction. To improve the quality of life for some of our senior and more experienced call agents, we recently implemented a new program that allows these agents to work from home.

Called satellite agents, these employees

### At a glance

*FedEx Canada began operations in 1987 as Federal Express Canada Ltd. The company now employs more than 5,000 people in 63 facilities to serve Canadian shipping needs from coast-to-coast, to the U.S. and internationally to 211 countries.*

*FedEx Canada operates a domestic air network that includes four Boeing-727s and additional feeder airlifts, providing next-day coast-to-coast service. There are more than 1,000 FedEx drop-off locations in Canada, and the three Canadian call centres—located in Vancouver, Toronto and Montreal—respond to about 36,500 calls a day.*

connect to our call centre systems via residential data and voice networks. The program has had a surprisingly positive impact on our overall service levels and resulted in more satisfied agents. This program also allows FedEx to re-route calls off-site, should unforeseen circumstances impact operations at our main call centres.

For many organizations, call centres

are seen as a necessary evil that drains a certain portion of the operating budget from the company each year. At FedEx, we believe that investing time and money into strategies and technologies that help us more efficiently respond to customer inquiries has a positive impact on the long-term success of the company.

We are proof that focused and strategic call centre investments can dramatically

speed customer resolution and improve customer satisfaction. We encourage others in the service industry to work with their call centre teams and outside vendors to implement more intelligent, customer-centric call centres. **cm**

*Patsy Bertoia, managing director of Customer Service for FedEx Express Canada, has worked at FedEx more than 20 years.*

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# Alberta: a wealth of opportunity

“Alberta is blessed with an abundance of natural advantages, which have formed the foundation of our province’s thriving economy,” reports Garry MacIntosh of Dell Canada Inc. and director of the Alberta Call Centre Association (ACCA), quoting the Alberta Economic Development Authority. It boasts a positive business climate that encourages investment, creates diversity and empowers Alberta businesses to compete successfully around the globe. According to Alberta Economic Development, Alberta’s positive business climate includes:

- The lowest overall taxes in Canada.
- No provincial sales tax (the only province in Canada without one).
- No general capital or payroll taxes prevalent in other provinces and U.S. states.
- A highly entrepreneurial and competitive business community.
- A government committed to less regulation to enhance business competitiveness.
- A fiscally responsible government that has eliminated its provincial debt.
- A highly skilled, educated and motivated workforce.
- A strong science and technology culture.
- World-class infrastructure to support business, including transportation, telecommunications, and utilities, as well as excellent hospitals, schools and post-secondary institutions.

More specific to this industry, EDA reports that post secondary institutions across Alberta have recognized the opportunities that the contact centre industry presents to their student population. One example is Norquest College – a public college located in the capital region of Edmonton. Their introduction of a Call Centre Training Program speaks to the need to provide additional, specialized training. The program was developed in consultation with industry experts and is intended to provide students with the practical skills they need to succeed and prepare for immediate job opportunities. Technology-based institutions such as

NAIT and SAIT have also worked to form partnerships with various employers in our industry.

Currently the vast majority of contact centres in Alberta reside in the two major urban centres of Calgary and Edmonton, reveals EDA. “With the surging economy in both metro areas, more and more companies are seeking creative ways to meet hiring and staffing requirements. Reaching out into smaller centres across the province can often provide access to untapped workforce resources. Often the options provided to current and prospective employees allows the Alberta call centre industry to succeed in a competitive environment – many companies all attempting to recruit qualified, skilled employees. Work from home programs, part-time employment and other options are a few of the ways the industry has been able to both attract and retain talent.

MacIntosh also cites the *Greater Edmonton Labor Market Forecast: 2006 – 2010* by the Edmonton Economic Development Corporation (EEDC), which notes: “Throughout the province ‘help wanted’ signs dot the landscape. With Alberta’s economy continued to be fueled by the resource industry, many individuals from across Canada and North America continue to flock towards job/career opportunities. With the migration of families to the province, it has been noted that a spouse or partner often seeks additional employment. The contact centre industry has been able to provide attractive opportunities surrounding job flexibility, benefits and career growth. A provincial government which has encouraged business investment has fostered an environment which attracts corporations to the area. The current zero percent PST remains an attractive perk for both business and individuals alike. Edmonton’s Economic Development Corporation indicates that the Edmonton CMA’s economy is forecast to grow slightly faster than the Alberta economy as a whole over the period 2006 to 2010. Total GDP across all industries in

the Edmonton region is projected to increase by 4.8 percent in 2006, with the annual rate of expansion gradually declining to 3.2 percent by the end of the decade.”

Calgary’s Economic Development Services has reported that economic indicators continue to point towards additional growth and development, according to the Calgary Economic Development Services 2005 Annual Report.

The ACCA is itself a dynamic, professional organization that has served as Alberta’s central resource for industry information, networking and educational opportunities since 1997. It was formed in response to the industry’s significant growth in the province. Prior to this time, there had existed for a number of years an organization called “Team Alberta” consisting of TELUS and the Edmonton and Calgary Economic Development Boards, which had been formed for the purpose of attracting call centres and their subsequent business to the province.

From May to July 2003, Alberta Innovation and Science, in conjunction with the Alberta Call Centre Association, conducted a survey of Call Centres in the Province of Alberta. The 2003 Call Centre Industry Profile is available at the ACCA office for \$25.00 plus GST. The book includes sections on location, operations, activity, agents, supervisors, team leaders and support staff, technology, recruitment, training and retention of agents, recruitment of managers, and challenges.

Also available through ACCA for \$25 plus GST is the book, “Call Centres: Calling Alberta Home”, produced in 2003 by Alberta Innovation and Science in conjunction with the Association. This book is geared more towards the “Alberta Advantage” and bringing call centres to Alberta. [www.abcallcentre.com](http://www.abcallcentre.com) **cm**



# Cooking up a base of loyal staff

**Building loyalty among staff isn't as easy as baking a cake, but following this recipe for retaining agents might well bring you some pleasant surprises, especially to your centre's bottom line.**

BY AFSHAN BYE AND WINSTON SIEGEL

In a 2006 poll of contact centre executives, they agreed that employee attrition is their number one business concern. Not surprising when you look at the statistics – the average attrition rate for internally run centres is 20-30 percent and for out-sourcers, it is 40-50 percent.

When we calculate the visible and “hidden” costs of our clients’ attrition, their shock is immediate! The good news, of course, is that knowing the real cost of attrition helps contact centre leaders make smarter investment decisions – it allows you to shift spending into other areas without increasing overall operational expenses. We had one client reduce their attrition by 10 percent and save over \$100,000 which was reinvested in incentives and coaching.

As sobering as those numbers are, the statistics simply point to the root cause of why call centre staff, primarily agents, leave. Leaders do not focus enough of their time on agents’ “What’s In It For Me?”! They may have a monthly incentive plan and decent induction training but a rigorous consistent approach to WOWing their agents is often missing.

When it comes to customers and employees, there is a useful expression: “loyalty is the absence of a better option”. If you want your employees (and customers) to remain loyal, you simply have to be the best option available to them. Remember, you are competing for valuable resources.

The way to do this is what we call the “Recipe for Retention”. The recipe is a use-

ful analogy. Improving retention is similar to baking a cake – you line up all the ingredients in the right measures put them together in the right sequence and cook for the right amount of time at the right temperature. Voila, cake! Leaving out two or three ingredients or deciding to lower the temperature (to save on electricity?) may give you a “baked something” but you may not want to offer it to your guests.

## **The Recipe for Retention has the following ingredients:**

### ***Offer competitive compensation & benefits***

This is foundational. People in entry level jobs are often stressed about making ends meet and a 10 percent increase can make a difference. If you are well below market rates, you will not be able to keep the best.

### ***Select the right people for the job and your culture***

If sales are required, hire people willing to take that on (with support). If your comp plan is pay for performance, don't hire the risk averse.

### ***Coach and train them for skill development, confidence***

There is an unfortunate lack of coaching in contact centres. Like anyone in any job, if agents lack the skills to do the job confidently—including dealing with tough customers and selling—job stress may trigger an exit.

### ***Give them a schedule that matches their lifestyle***

Do not underestimate the pressures

to deal with childcare or meet school demands. Respect these issues and they will be more devoted.

### ***Strong support structure in systems and processes***

Poor systems, confusing marketing information, out of date policies all add to the frustration of the job. Constant frustration is a trigger to consider other options.

### ***Personal recognition***

Everyone craves a pat on the back for a job well done! A personal thank you from their supervisor or the contact centre director goes further than being on a chart for a quarterly incentive.

### ***Open and engaged leadership***

Being heard, having personal support, feeling inspired, having fun, feeling important and unique requires a tuned in and on the floor leadership group.

The best measure of customer loyalty is found by asking customers about their “loyalty behaviours”. Will they continue to purchase? Purchase new goods or services? Recommend your company to others? The same measurement applies to your employees. The best measure of employee loyalty? They tell you they are not looking for a new job; they rave about and recommend your company to their friends and family.

If your agents are not raving, you may want to go back and find out which ingredients are missing. Providing an inspiring, fun, high performance environment requires discipline and is the number one job for contact centre leaders. **cm**

*Afshan Bye and Winston Siegel are both partners at SwitchGear Consulting. [www.switchgear.ca](http://www.switchgear.ca).*

# Four technologies creating upheaval in our industry

**Here's the first in a series to demystify technology enablers and explore their impact on how you serve your customers, manage your operations and increase your centre's contribution to your enterprise.** BY BOB HUGGARD AND JOHN MUNRO

There is change afoot for the contact centre industry. The explosion in networking technologies such as Internet Protocol (IP), presence, Session Initiation Protocol (SIP) and others will allow people to communicate without restriction from any location, on any device, and through any media. The erosion of proprietary voice technology will enable corporate IT organizations to better manage the evolution of Contact Centre and Enterprise communication solutions. Service Oriented Architectures (SOA) and Web 2.0 will break down barriers between business systems and flatten organizational stovepipes. Contact Centre operations will seamlessly integrate with corporate mid-and back-office processes to eliminate hand-offs, rework and maximize productivity. Knowledge workers will now effectively operate as a valued element of the customer interaction process.

Information technology (IT) and communications have traditionally been separate

and distinct industries and corporate operations. Each developed, propagated and promoted proprietary vendor solutions to address enterprise business issues. As a result, the contact centre solution market is dominated by a small number of PBX vendors and third party solution providers. Further IT solutions are isolated in multiple proprietary systems, and maintained by numerous internal organizations with tribal knowledge of the "business rules". As a solution to this disjointed situation, organizations established contact centres and put service representatives in place to mediate the customer's inquiry and to navigate the various disparate business processes required to fulfill the request.

Recent evolutions in IT architectural standards and communication protocol standards are poised to enable a fundamental shift in the effectiveness and manner in which you interact with your clients, and enable your IT organization to build and maintain communications solutions.

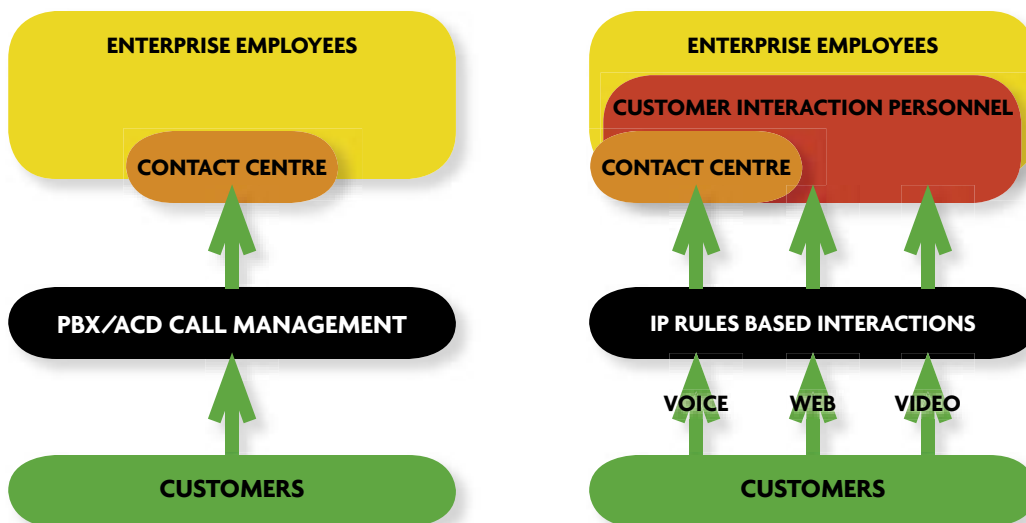
There are four emergent technologies that will enable a more efficient, integrated and content-rich interaction between customer and enterprise.

**IP Telephony or Voice 2.0:** The switch to IP telephony will facilitate access to the enterprise telephony service from anywhere, at any time. With the development of the SIP protocol the world of communication has standardized on how to set-up, route and tear down calls and other media interactions.

**IMPACT:** True "virtualization" with access to highly skilled contact centre agents and valuable knowledge workers, whether in the office, at home, or on the road can now be effectively leveraged in the customer interaction process.

**Presence Information:** If you or your teenager has been on MSN you have been using presence services. Presence is simply a service that indicates if a person is "there".

**IMPACT:** Think of this as your ACD status on steroids – you can control your status and the network is aware of each user's interaction capabilities. With "user registration" data in the presence server, the IP



telephony network can distribute, queue and re-direct a call, email, SMS, chat, etc. to a device (PDA, laptop, wireless, etc.) according to an established set of criteria such as schedule or urgency level.

**Services Oriented Architectures (SOA):** This is a business-centric approach to designing IT systems that supports the integration of your business as linked, repeatable business tasks or services.

**IMPACT:** Adoption of SOA can tear down the walls that separate your business systems and eliminate the need for stovepipe operations. This significantly reduces the cost of solution development, and allows customer service business processes to be built end-to-end, inclusive of the often-isolated contact centre operation.

**Web 2.0:** An evolution of SOA that will evolve beyond an individual enterprise

## These changes will ultimately expand the influence and contribution of the contact centre to the enterprise.

structure and governance, and emphasize online collaboration and sharing among users, systems and business process interoperability, thereby establishing business process networks.

**IMPACT:** The most obvious impact of these "business process networks" will be a potential reduction in 'agent-enabled' interactions due to integrated business processes that span organizational transactions. Over time, contact centre outsourcing engagements may actually evolve into real-time labour arbitrage among global business process outsourcers.

Evolutionary shifts such as virtualization, self-determination, end-to-end

business processes and knowledge worker accessibility are making for a period of upheaval in the contact centre space. These changes will ultimately expand the influence and contribution of the contact centre to the enterprise.

In the coming issues, we will discuss evolutionary shifts in more detail and the ramifications on operations, customer service and the role of the contact centre in the enterprise. **cm**

*Bob Huggard and John Munro are consultants within the contact centre space. bob.huggard@bermconsulting.com; john.munro@ambirsolutions.com.*



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# How to keep VoIP networks secure

**The contact centre is the Voice over Internet Protocol (VoIP) application where the greatest customer service improvements and cost savings will be realized. But, DNS and DHCP errors may render VoIP services completely unreachable.**

BY MICHAEL HYATT

VoIP is quickly becoming the standard in the contact centre industry, enabling a cost-effective, centralized and consolidated communications platform. "Improvements in reliability" and "voice quality," along with tailor-made vendor migration programs, are "largely helping overcome the initial resistance to VoIP and Internet protocol among small- mid sized contact centres in North America," according to research firm Frost & Sullivan.

Not only has VoIP turned the traditional call centre into a multi-modal contact centre by giving business communications multimedia functionality, but the technology is destined to solve problems fundamental to the needs of every contact centre manager – i.e. improve customer service while lowering operating costs, provide the same levels of response for e-mail and Web

contacts as has been provided for phone calls in the past and streamline globally dispersed contact centres.

Widespread VoIP adoption is being driven by the need for larger enterprises to locate smaller contact centres in areas where skilled, cost-effective labour is more readily available. VoIP is being touted as an efficient way to implement an "agents anywhere" strategy as well as managing the remote workers with less cost and more flexibility.

By networking multiple centres together as a single centre, the same volume of phone, e-mail and Web contacts can be handled by fewer customer service agents. This cost savings alone could justify deployment of these latest generation IP-based systems.

The appeal of VoIP has been the no-

tion of managing a single network for all the communication needs of a company, rather than running disparate communications applications with analog and packet switched data networks. However, as with any technology that relies on the Internet, concerns over security and performance are inevitable. The service levels deemed satisfactory for data transfer are simply not adequate to support VoIP. If there is a lag in delivering data on a VoIP network, the effects can render the network unusable. Because of the real-time nature of VoIP, quality of service and high availability issues must be considered and taken into account. These are elements of network management that affect the chances for a successful VoIP rollout.

All elements of a VoIP network must be secure. The application servers must be dedicated to a small number of tasks and have only the necessary ports open. This is referred to as server hardening – a process of eliminating overly permissive defaults and unnecessary, potentially exploitable features. Security and reliability goals

see **VoIP watch** page 27

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## British Columbia Contact Centre Association (BC CCA)

Reported by Jean Mitchell

March 28, 2007, marked yet another sold out BC CCA Call Centre Tour Event. This year we had the opportunity to visit with the following four great companies: BC Automobile Association (BCAA), 1-800 Got Junk, E-Comm and Pacific Blue Cross.

The event started at 7:30 a.m. with a panel discussion over breakfast, hosted by BC CCA Board members. The Panel was comprised of the tour site hosts: Barbara Mount and Barbara Dyck from Pacific Blue Cross, Norm Hait from BCAA and Ryan Lawson with E-Comm. Presentations gave the members a great insight into the uniqueness of each of the centres they would be visiting.

At 8:30, members boarded buses to tour their chosen sites. The tours included visiting with the staff and just plain getting to know the centres and the employees.

Buses arrived back at the Executive Inn Hotel at noon, where everyone dis-

## association news

embarked and carried on with their day. Feedback has been overwhelming, with the underlining point being how well each centre embraces their CSRs and team leads to really showcase their centres.

Thank you to everyone who helped to make this day a roaring success! Think about showcasing your Centre next year.

Coming up: May 16 breakfast seminar on The Pros & Cons of Implementing and Managing a Remote Workforce in a Contact Centre Environment. June 5-6: Be Your Own Operational Review Contact Centre Consultant! This two-day workshop for BC CCA members only is presented at BCIT in Vancouver by BC CCA and the Acclaro Group, LLC, with facilitator Gina Szabo. Pre-registration and pre-payment (\$824 total) is required.

Details at [www.bccontactcentre.com](http://www.bccontactcentre.com).



## HELP DESK INTERNATIONAL (HDI)

HelpDesk BC

Reported by Vanessa Goodall-Simpson

HelpDesk BC is very proud to announce that Chris Dolding from ICBC received the 2007 Help Desk Institute Canadian Regional HelpDesk, Analyst of the Year award. This award is globally sponsored by Robert Half Technology. Dolding represented Canada at the HDI International Help Desk Analyst of the Year competition at HDI's 2007 Annual Conference April 30 – May 3 in Las Vegas, NV.

HelpDesk BC has achieved HDI's Gold Circle of Excellence. HDI's Circle of Excellence program encourages all local chapter groups to strive for service excellence, program diversity and community involvement. HelpDesk BC entered the program last year and, in our first year, we have implemented a Resource Library, improved attendance at HDI events and strengthened our processes and procedures. Congratulations to the HDBC Executive Team for this great achievement!

Since 1989, HelpDesk BC has been comprised of volunteer industry professionals. HelpDesk BC is an avid supporter and affiliate to HDI, [www.thinkhdi.com](http://www.thinkhdi.com). The

see **Association News** page 26



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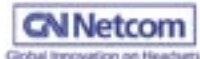
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meetings provide a networking forum for help desk, technical support and customer service professionals and their peers. Executives work in tandem to represent the interest of members and the profession at large by establishing meetings and activities to promote information exchange. On a monthly basis, support professionals meet to draw on the expertise of industry associates, share best practices and help each other with ideas to improve. Monthly from September to June, the executives bring in keynote speakers from around the world to facilitate industry specific topics. At least once a year, HelpDesk BC negotiates a week of professional training by bringing in the best the industry has to offer at a discounted rate to our membership. [www.helpdeskbc.com](http://www.helpdeskbc.com)

**HDI Toronto Chapter**

*Reported by Don McCarroll*

HDI Trillium congratulates our chapter's Help Desk Analyst of the Year, Shaukat Talib, information support representative at McCarthy Tétrault. "He is knowledge-

able and has very good judgment skills. He is professional, patient and composed when dealing with difficult callers and has the ability to manage challenging situations," notes his nominator and manager, Sophia Gast.

President Carol Parker reports: "We just had our fifth annual and very successful HDI Trillium Chapter Conference Day on March 28. We received great feedback from the participants on the venue, location and speakers. Everyone of the speakers did a great job in engaging the audience and giving them a "New Perspective". Thanks to our vendors for their sponsorship. We will make the event even better next year! Thanks to the HDI Trillium executive team (who volunteer their personal time) for contributing to the success of this event. If you are interested in joining the HDI executive, we would love to hear from you. Please send your inquiries to [president@hditrillium.com](mailto:president@hditrillium.com)."

The current executive along with president Carol Parker is: vice-president, Programs – Hasib Sayed; national coordinator & vice-president, Finance – Todd Van Horne; vice-president, Membership – Chantal Gallant; vice-president, Communications & Newsletter Editor – Don McCarroll; web masters – Nigel Chubb & Hasib Sayed; chief knowledge officers – Ann Roach, Sharon Lovett.

Coming up — May 17: 11:45AM - 2:00PM (Lunch will be served at noon) – a presentation by Glen Purdy, associate director with Fujitsu Consulting, Inc., on capturing the critical linkages between ITIL processes/activities and the required business results.

June 13: our annual networking event on e-Crimes. Details at [www.helpdesktoronto.org](http://www.helpdesktoronto.org)

Thinking about becoming a new member? Call 416-352-1792 or contact: [vp\\_membership@helpdesktoronto.org](mailto:vp_membership@helpdesktoronto.org)

**HDI Montreal**

After 15 years of operations, on March 1, 2007, the HDI Chapter in Montréal regretfully announced that it had ceased its activities as a chapter of Help Desk International. The notice in French read that this

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decision was difficult to take but logistical and financial problems had made it impossible to offer a superior quality of activities.

The organizers thanked those involved in the association for the past 15 years. For further information, email: [activites@hdi-montreal.qc.ca](mailto:activites@hdi-montreal.qc.ca). **cm**

**VoIP watch** - cont'd

recommend the use of appliance servers for critical services such as domain name system (DNS) and dynamic host configuration protocol (DHCP). Both DHCP and DNS services must be properly configured and reliable.

Without efficient management of VoIP address space—DNS and DHCP—there can be no VoIP services. In a world where any device can be given an IP address and be connected to the Internet, proper management of the address space must be considered the single most important factor in providing a return on investment from VoIP services.

Modern networks use DHCP to configure clients. Without using DHCP, the “agents anywhere” strategy today’s contact centres are turning to VoIP for would be impossible to implement. VoIP devices require more complicated configurations than the average network client. Without a well-managed configuration, VoIP devices can potentially lose connectivity or be supplied with inaccurate network configuration settings. As the number of VoIP devices on a network grows, DHCP management becomes more complex.

Key to maintaining services that provide a consistent revenue stream is the efficient management of data. In terms of Internet services, and specifically VoIP services, the most crucial data to manage correctly are the DNS zones and resource records.

The combination of DNS and DHCP management on one system creates an enterprise management tool that can conveniently manage a VoIP address space infrastructure and advanced DHCP options specific to VoIP devices, from a single server.

Providing well-designed and well-managed networks for VoIP implementations to run on is essential.

*Michael Hyatt is co-founder, president and CEO of BlueCat Networks, Inc., a Toronto-based developer of purpose-built IP network appliances.*

**coming events: 2007**

**MAY 14 - 16:** Alberta Call Centre Association ninth annual conference, Coast Plaza Hotel & Conference Centre, Calgary, AB. [www.abcallcentre.com](http://www.abcallcentre.com)

**MAY 14 - 16:** CMA 2007 National Convention & Trade Show, Ottawa Congress Centre, Ottawa, ON; [www.the-cma.org/convention](http://www.the-cma.org/convention)

**MAY 15 - 16:** MCCA AGM, trade show & conference, Winnipeg, MB; [www.mcca.mb.ca](http://www.mcca.mb.ca) 204-975-6464

**MAY 23:** 2007 ORRCA Career Excellence Awards Gala, La Contessa Banquet Hall, Ottawa, ON; [www.callcentres.org](http://www.callcentres.org).

**MAY 28 - 29:** Canadian Institute best optimizing centre strategies conference (in French), Montreal, QC; [www.institutcanadien.com](http://www.institutcanadien.com).

**JUNE 13:** HDI Toronto, ON; e-crimes [www.helpdesktoronto.org](http://www.helpdesktoronto.org)

**OCTOBER 16 - 19:** CAM-X 43rd Annual Convention & Trade Show, St. John's, NL; Linda Osip, 800.896.1054, [linda@camx.ca](mailto:linda@camx.ca)

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