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Mar/Apr 2007

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Plus

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Handling irrational industry bashers

When Contact Professionals Alliance founder Elizabeth Winter invited the media to the Toronto-area February breakfast meeting where a former hostage negotiator gave tips on handling difficult callers and improving communication skills, she had no idea it would be used as an opportunity to disparage the industry. The message broadcast by the CBC was along the lines of 'things are so bad in the telemarketing industry that a hostage negotiator had to be called in.' See the real meeting synopsis in our Association News.

Quite apart from the disappointment that the CBC has to be part of the 'if it bleeds, it leads' sensational mainstream media to get viewers and listeners, it's frustrating that the contact centre (note not just telemarketing) industry continues to get dumped on. I realize I'm preaching to the choir, but this is the message we need to get out:

- "Contact centres are high performing, highly technical operations which impact its workforce," notes Donna Miller, chair of the federal sector council Contact Centre Canada. "They are a highly cohesive, motivated, dedicated group with the ability to multi-task and adapt to rapid change in a face paced, highly demanding, customer-focused environment."
- Canada's contact centre industry is staffed by people highly skilled in communication, technology and managing. "All (industry) sectors capitalize on the efficiency gains created through its telephone and technology capability," Miller adds. "Contact centres are on the leading edge of technology and impact industry standards in these areas across all sectors globally."
- Employing about 450,000 Canadians, the contact centre industry is an extremely large sector and very significant to Canada's employment base, reports John O'Brady, Prism Economics and Analysis partner.
- Outbound calls, including telemarketing, market research and collections, are estimated to account for maybe 10 percent of the action, with the majority being inbound calls for account management, order taking and technical support.
- In those sadly small circles of the well informed about the industry, "our sector is recognized as a people, process and technology leader," Miller adds. "The sector characterizes workforce trends and the industry is a blueprint for how business will be conducted in the future."

Contact Centre Canada also notes that in 2000, the customer contact centre sector contributed \$36 to \$38 billion (four percent) to Canada's gross domestic product (GDP). In comparison, Canada's construction sector contributed \$48 billion (5.1 percent). The customer contact centre sector employs four out of 100 working Canadians in over 13,000 customer contact centres. Many more Canadians are engaged in providing services to the industry.

This industry counts. It contributes. As long as there are consumers with comments or needing help, this industry will serve a vital role. It deserves respect. We must not let anyone – especially members of the media – get away with treating it otherwise.

Susan Maclean
Editor



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next issue...

MAY/JUNE – Protecting against identity theft, how to find and evaluate an outsource option, inbound software showcase, regional profile on Alberta.

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

...CAM-X AT CANNES...

At the Contact Centre Global Forum in Cannes, France, in April, decision makers from around the world will come together for the first time to address the challenges facing this industry. Since one of the goals of the Canadian Call Management Association (CAM-X) is to work with other associations on a more international level, participating as a partner at this Forum is a given for this vibrant association.

"We're over the moon to be involved in the summit," enthuses executive director

Linda Osip. "As an industry trade association, we keep learning and growing. We share with our American counterparts and we have a new member from England. We want to be on the leading edge of what's happening, find out best practices in other countries and keep our finger on the pulse of the industry. So, we're very excited about the Contact Centre Global Forum."

Osip describes CAM-X as forward-thinking with members loyal to the association and willing to share their failures as well as

successes. Calling itself the national voice for the call management industry, CAM-X contributes to members' profitability by fostering a willingness to exchange ideas, experiences and solutions while promoting the general welfare and ethical standards of the industry.

CAM-X is one of more than 20 worldwide associations backing the Global Forum and helping to create an international platform to address challenges and enrich the industry so participants can improve performance, grow their business and extend their knowledge.

As a Forum partner, CAM-X members receive a discounted rate. Also, for every CAM-X member that attends, the association will receive a share of the Forum's revenue – money that will be invested to improve standards in the industry and the association's services to members.

For details, contact www.cam-x.ca or 1-800-896-1054 **cm**

...VERINT ACQUIRES WITNESS...

Verint Systems Inc., the Melville, NY-based provider of analytic software-based solutions for security and business intelligence, and Witness Systems, Inc., the Atlanta, GA-based provider of workforce optimization software and services, announced Feb. 12, 2007, that they have entered into a definitive agreement under which Verint will acquire Witness for \$27.50 per share in cash. The convergence of Witness' workforce optimization and Verint's actionable intelligence will create a broad portfolio of contact centre and enterprise performance solutions, "delivering a compelling new vision for the customer-centric enterprise," according to the announcement.



acquisition. There weren't many other details that Verint's Mariann McDonagh, vice-president of Global Marketing, and Ryan Hollenbeck, vice-president of Corporate Marketing at Witness were free to disclose at this early stage in the agreement. For legal reasons they were not able to comment on the combined value or joint market share of the new entity. We will have to wait to hear decisions like whether the Witness name will remain after a three- to four-month integration team completes its deliberations. However, Hollenbeck stressed that was one of the values Witness brings to the table.

Hollenbeck described the intersection of the companies as having "a unique value" for companies with different types of business strategies from driving more revenue to solving specific business problems. He admitted that in areas like recording where there is an overlap, there will be some product sorting out, but along with McDonagh, stressed the two companies' convergence in vision.

It appears that Witness could give Verint greater traction in contact centres while Verint will bring Witness deeper into the enterprise. "Our combined portfolio will target solutions across a wide range of the market," McDonagh confirmed.

The total enterprise value of the transaction is approximately \$950 million. The transaction is targeted to close in the second quarter of 2007, pending approval by regulators and stockholders of Witness Systems, and other customary closing conditions. **cm**

The combined Verint/Witness portfolio includes solutions for quality monitoring, IP recording, multimedia interaction capture, speech and data analytics, performance management, contact centre and enterprise workforce management, eLearning and eCoaching, customer feedback management, and a full range of strategic professional and consulting services. The companies claim this combination will enable small- to mid-sized companies and large organizations "to leverage customer intelligence for better business decisions and optimize workforce, contact centre and enterprise performance to deliver a compelling customer service advantage."

We're very focused on continuing to support our customers and invest in our products – that's the key message Verint and Witness Systems wish to get across to this publication's readership in light of the

...MARKETEL WELCOMES DNC LIST..

The Do Not Call legislation coming this summer in Canada is long overdue, according to Ngee Cau, CEO of MarkeTel Systems, a Regina, SA-based company providing predictive dialers. He sees the legislation which protects consumers from unwanted callers as good for the telemarketing industry.

"The telemarketing industry has a bad



reputation," he says. "Do Not Call legislation helps monitor the industry. From what we've seen in the US, the good telemarketers will survive; the abusers will not."

Cau says the company has strong sales of its product in the U.S. and has had to comply with DNC legislation already in play. He notes that MarkeTel's predictive dialers screen out names on the DNC list. "Every time before the call goes out, it does an automatic check – what we call real-time scrubbing," he says.

The company recently introduced its latest predictive dialer, Prospector v.1.2, designed for call centres of all sizes and ambitions. **cm**

...GLOBAL FORUM 2007 BEGINS APRIL 25...

Billed as the first event to unite the world's contact centre community, the Contact Centre Global Forum is a three-day event in Cannes, France where contact centre leaders from four continents will meet, share experiences and collaborate on an agenda designed to raise industry-wide performance.

Organized by ICT Communications in association with Reed Exhibitions, the event will combine a world class independent conference program with interactive

workshops and panel debates, expert regional reviews, one2one meetings, and the opportunity to create a blueprint for change across the industry.

The theme for the 2007 Forum is 'Performance!'

Christina Wood, Forum director, notes: "Conference speakers will kick start discussions that will be taken up by delegates in our interactive workstream and Global Future Summit. With presentations, interactive sessions, panel debates, and in

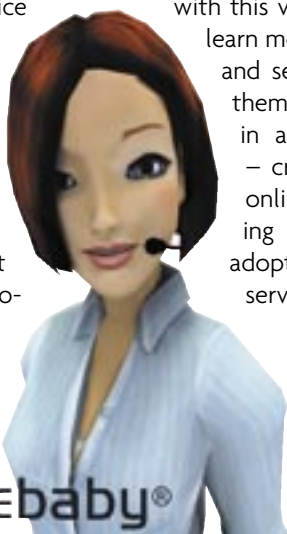
the Business Exchange we will address the topics you have told us are important:

- People and culture – retention, recruitment, motivation and change management;
- Customer expectations – putting the customer first; building loyalty, spend and advocacy;
- The technology challenge – keeping pace and delivering value;
- Building business – new ventures, alliances and working models;
- Delivering value – cost, revenue and shareholder value."

...RBC SELECTS CODEBABY VIRTUAL AGENT...

Virtual Agent based self-service solutions provider CodeBaby announced Jan. 24 that Royal Bank of Canada (RBC), Canada's largest bank, has licensed its Virtual Agent Customer Care Platform to help clients learn more about their key financial products and services. RBC will be the largest financial institution to leverage CodeBaby's innovative customer care platform and will allow the bank to deploy a virtual agent anywhere on its website to support customers with online services.

RBC expects that



with this virtual agent, clients will learn more about new products and services and how to use them at their own pace and in a more interactive way – creating a more dynamic online experience and paving the road for increased adoption of online banking services.

"Our virtual agent encourages clients to try new features and makes the overall online experience more fun and engaging," reports CodeBaby CEO Shaheel Hooda.

Edmonton, AB-

based CodeBaby claims to enable organizations to integrate state-of-the-art, interactive 3D characters into Web sites, software, mobile devices, kiosks, IPTV and eLearning applications. CodeBaby's Virtual Agents are said to improve a company's ability to interact with its customers cost-effectively, offer a higher level of online or on-device customer care, and make technology more enjoyable and easier to use. Accolades include Branham Group's "Top 25 IT Up and Comers" list in 2004, being named a Finalist in the Red Herring Top 100 Most Innovative Companies list in 2005, and ranked among the Top 10 fastest growing companies in Alberta Venture's Fast 50 list in 2006 and 2007. Customers include organizations in the telecommunications, financial services and education sectors, as well as government. **cm**

The event is targeted at:

- senior customer management and contact centre strategists from commercial and non-commercial organisations the world over;
- strategic business leaders and operational directors from outsourced contact centre companies;
- directors of national government bodies whose remit is to support the development of their country's contact centre industry;
- senior executives from contact centre industry bodies and special interest groups;
- suppliers of business solutions.

It is the first global event where you can meet senior decision makers from contact centre operations of all types and size; domestic and international, in-house and outsourced, private and public sector and share best practice, standards and ideas, create commercial and professional alliances and network with your peers from around the world.

The Forum is supported by 30 industry associations across four continents, including Canada's CAM-X. *Contact Management* is a media sponsor.

The venue is the Palais des Congrès in Cannes, at the heart of the French Riviera. Registration costs run from the individual and industry rate of US\$1485, to the Forum Partner members rate of US\$890 and the Business Exchange rate of US\$450.

For program, registration and other details, go to www.ccglobalsforum.com or call 44 (0) 1483 755647 **cm**

...LETTER TO THE EDITOR...

Dear Editor:

I heard your passion when you spoke at the GTACC (Greater Toronto Area Contact Centre association) and wanted to let you know that after reading the Jan/Feb 2007 edition of your magazine, it translated into what I read in your publication. I wish you well on your continued commitment to building the reputation of your magazine and the Canadian contact centre industry. I look forward to your next edition.

Bruce Simpson
SwitchGear

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10 strategies for checking what your callers hear

Mystery calling has come a long way in recent years. For many, it plays a very important role in building and sustaining agent performance.

BY SHARON OATWAY

If you have ever been the recipient of an ill-conceived mystery calling program you would likely recognize it immediately. Heavily scripted. Awkward pauses. A recognizable voice. And then the all-too-familiar “gotcha” moment when the results are compiled and presented days later. No recording as backup. No room for debate. Just a report with broad generalities and a lot of anxiety.

It doesn't have to be that way. And, while we tend to think of mystery calling as a call centre tool, more and more companies are looking to mystery calling and call monitoring in general to gauge the overall customer experience with their organization and their brand.

Expedia Canada's director of Travel Operations, Sandy Pinto, introduced a mystery calling program into their outsourced customer service operation four years ago. “When we started to investigate mystery calling for our centre we had trouble finding a service that offered us the flexibility that we felt we needed. Most offerings were based on retail face-to-face mystery shopping efforts which did not address the unique needs and environment we faced in the contact centre.”

Critical to these needs was the desire to leverage the program to support centre managers in meeting their pay-for-performance targets. “From the outset our goal was to use mystery calling, not as a tool to identify the deficiencies of our supplier, but rather to help them achieve their

targets and ultimately their bonus,” says Pinto. “But we didn't have the time or the experience to pull the program together ourselves. And so, after some searching, we chose to work with VereQuest, a Toronto-based company who specializes in monitoring the customer experience. We found their approach and tools to be just what we needed to achieve best-in-class service for our customers.”

Here are Pinto's 10 tips for implementing an effective mystery calling program.

1. Keep it fully transparent. Make sure your entire approach from the initial design and implementation is open and upfront for all the stakeholders – whether it is an in-house or outsourced environment. How we do it: Both our management team and the call centre team participated in the design of the standards. Everyone has the ability to review the scorecards, reports and recordings of the calls via the internet in real-time. This has been critical to getting contact centre management buy-in.
2. Keep it ‘real’. Work with a number of different scenarios simultaneously which align with your current call mix. How we do it: Every month we develop new scenarios and now we have a database of literally hundreds of scenarios we can tap into. It's equally important to make sure that you can easily (and cost effectively) update the scenarios to keep them current.
3. Mix it up. Don't make all your calls over a few days. How we

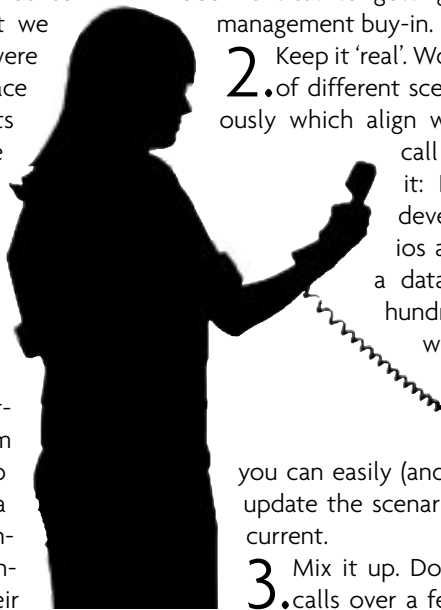
do it: We schedule calls over different days of the week, different times of the day and even weekends or overnight. We can also focus our calls where we have the greatest need such as a new queue or group of trainees.

4. Balance quantitative and qualitative points-of-view. We find that it's important to take into consideration the quantitative characteristics of the call (like tone and manner or objection handling) with the qualitative (like whether or not the customer experience was good). How we do it: Every call is scored twice – once based on how they performed versus our standards, and again based on how the mystery caller felt about the call.

5. Always get a digital recording of the call. If you intend to use this for coaching, you need a copy of the call. It's not good enough to just get a report. How we do it: Each of our mystery callers has the ability to record their calls and then they append it to the scorecard for easy retrieval.

6. Make sure you have real-time escalations. Mystery calling will uncover situations and customer experiences which you need to address right away. Build in automatic, real-time escalations into your program. How we do it: When a call scores below a pre-defined threshold or we encounter a poor customer experience, the call is automatically escalated to management for action. Equally important to the whole process is the escalation of great customer experiences so our feedback and recognition is timely and mystery calls are welcomed by the agents.

7. Obtain results in real-time. This is critical to support communication between you and your call centre management team as well as make “just-in-time”



adjustments. Reporting also needs to have the depth you need to address a number of diverse areas from overall program results or individual agent issues to pre-shift review and on-going training. How we do it: Our centre and management team are located in different cities and so real-time, web-based reporting is key. Each call is cross-referenced for reporting purposes which gives us the depth of information we need to address performance and training issues of all kinds. Plus, on-line access provides other stakeholders in our organization, like marketing or sales, with the ability to search for and review certain types of calls to better understand contact centre challenges.

8. Align your mystery callers with your customer profile. It goes without saying that you want your mystery callers to sound and act like your customers. If you cater to the seniors' market, hire seniors. If it is golfers, make sure they can carry on a conversation about golf. How we do it: Our customers normally access our company site from their home or office. So all our calls are made from our mystery caller's homes or offices – complete with interruptions, barking dogs and crying children!

9. Avoid fully scripting your calls. A fully scripted program won't be a "mystery" for very long if every caller is following the same script. How we do it: Our scenarios are designed to be flexible by providing date ranges, price ranges, location options, etc. in the form of detailed guidelines. Plus our mystery callers are specially trained to complete the task in their own way, with their own style and (importantly) in their own words while still following the guidelines.

10. Use QA specialists for scoring. It's important that your mystery calling program align with your internal QA efforts. Agents shouldn't be measured against two different sets of standards and expectations. How we do it: Our mystery callers complete the call and the qualitative evaluation and then it goes to a QA specialist for quality 'scoring'. This keeps our evaluations consistent and makes it possible for us to report our mystery calling efforts along side our 'live' call results. **cm**

Sharon Oatway, president of VereQuest Inc. (www.verequst.com) can be reached at 416-362-6777 or soatway@verequst.com.

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Creating a global presence

Contact Management did a random sampling of a few of Canada's contact centres to see what the resulting advantages and challenges were of going beyond Canada's borders. Here's what we found out.

BY SUSAN MACLEAN

Canada's strong education infrastructure and relative abundance of labour initially contributed to the growth of Minacs Worldwide from a provider of temporary employees for customer call centres in 1981 to supporting contact centre-based CRM services for several major North American corporations. Today, from headquarters in Toronto, Minacs is a publicly traded, global corporation with more than 6000 employees operating in Canada, the U.S., Germany, Hungary, the UK and Asia.

Minacs provides customized business process outsourcing solutions related to contact centres, integrated marketing services and back office administration. The company has clients in the automotive, financial services, telecom and technology, public sector and consumer products industries.

Jeff Williams, Minacs' executive vice-president, Sales and Marketing, reveals some of the company's lessons learned in establishing centres. His first tip is to look for "a labour match." Are there the right language skills? Is there education to support putting a contact centre there? What is the demographic of the labour force? "You've got to get the labour right or nothing matters," he stresses.

If establishing in another country, assess the economical situation. Consider the country risks, inflation rates, stability of the local market and the infrastructure, he says.

Williams finds cities give you the best access to the labour. The real estate is another issue but he says he has always been able to find the right real estate if he has found the right labour market.

Minacs considers these issues along with "a tremendous amount of customer influence," Williams admits. For example,

a competitor might be piquing a Minacs customer's interest in a part of the world. Or, sometimes a customer wants Minacs to locate in a certain market.

The lack of brand awareness can make it tough to attract staff at a new location since Minacs can not advertise a job serving a Fortune 100 company whose brand carries far more cachet than the Minacs name. "While our customers have powerful brands, we don't," he says. "By definition, our brand remains anonymous."

Williams advises finding the right management early because it is important to be up and running "right out of the gate." It also requires finding the right partners – such as economic development, recruiting firms, telephone companies and the like – in order to get market pricing for local services you are trying to procure.

He makes the point that Minacs has at least one technology environment per customer, creating a mind boggling myriad of options in technology configurations. There are many private VoIP options so that a call can land in North America and be taken around the world.

"We go into every customer with a blank canvas – every customer is so unique," he says. "We need to be flexible enough to have the right expertise."

Even so, the company standardizes on tools like Avaya and Cisco, as well as IEX workforce management, with in-house expertise for this software. "For other specific software and connectivity requirements, we have to go to market to find expertise. Sometimes the customer might have expertise to share."

One-stop for multilingual service

Being the Canadian contingent of

SR.Teleperformance, the world's second largest outsourcing provider, Teleperformance Canada president Erifli Morfidis notes the company has a presence in 42 countries and communicates in 60 different languages and dialects. "We're able to service multinational accounts without a problem," she says. "We can offer service to their customers in different languages so they get one-stop shopping versus finding multiple partners."

Teleperformance also attracts companies looking to offshore or near-shore locations for the purpose of diversifying where their work is being done. Other English-speaking locations include Mexico, Philippines and India, with the latter two often selected for cost reasons.

In addition to cost reduction, Morfidis finds having global capabilities serves Canadian companies who are looking for back office work – such as email responses or changes to an account – to be completed during Canada's overnight hours.

She also points out that of the estimated 300,000 agent positions outsourced in Canada, 14,000 are for U.S.-based firms attracted to the loyal, highly educated Canadian labour pool. She says that Canadian companies need to educate the U.S. firms that our services are now the same price but the Canadian contact centre retention rates are better.

Working with a global outsourcer means certain decisions need to be made, she cautions. "If a company wants to work with us in 10 different countries, we need to advise on what works in the past and how to set up internationally. For example, if they have one management team in the U.S. and another six teams in the rest of the world, do they want one single point of contact? We have to make sure we marry up our partnership to the client in a way that best fits their internal management and is consistent country to country.

Do they want multiple account managers? Do they want them to be treated all the same way or catered to different regions? When a company works with us to help us understand how they work internally, then we can advise what would work best. We will mirror the way they are set up.”

Morfidis says both call centre technology and telecommunications have evolved so they can have agents log into their system in the Philippines, India and Toronto all off the same switch. Teleperformance Canada uses Avaya as their main system and Blue Pumpkin as their workforce management tool.

Beyond technology, she finds it helps to be delivering business in the same consistent method and to have that consistency in the global operation certified by an external body. Teleperformance in Canada and Mexico are certified by Customer Operations Performance Center Inc. (COPC). Teleperformance Canada is also Payment Card Industry (PCI) compliant. “This security implementation established for contact centre companies allows clients to know wherever we are we offer consistency of service,” she stresses.

Building an international base

A worldwide strategy is as yet down the road for TigerTel/UTR but the company is looking at technology that may eventually position it for a global presence, says Sue Douglas-Coetzee, VP sales.

The company specializes in multilingual inbound and outbound call centre solutions and services for clients throughout North America from multiple call centres in Canada.

The company’s strategy of late has been focused on growth through developing new business from existing verticals and referrals within North America. As a result, it has expanded considerably into the U.S. to the point that the company’s top 10 clients are U.S.-based.

“We’re building on our core strength and examining our technology and planning a significant change to new technology that will improve our ability to service more seamlessly a larger volume,” she says. “That could help us globally down the road. We have very many locations share traffic and we get significant spikes in traffic. Capacity is a huge issue for us.”

She cites the example of regularly taking 1,000 calls an hour for a client when suddenly an ad on TV appears and 20,000 calls come in during 15 minutes. “We have to find our own capital technology or outsource technology to blow up or shrink to that degree. We have a provider designing and testing technology that we call “the host in the cloud” which captures calls and keeps them until they can be processed. Instead of callers getting a busy signal, the technology enables us to capture calls and not lose them.”

The technology has been in development since the tsunami in Asia-Pacific prompted. TigerTel/UTR has many not-for-profit clients. The company was answering calls for donations to World Vision and Habitat for Humanity, for example, with 6,000 agents across Canada. At that time, a prototype version was created which enabled TigerTel/UTR to collect hundreds of thousands of dollars in tsunami recovery donations.

The company is now making it a core technology that it wants to be transparent and seamless to clients. And then, on to the world stage. **cm**

Canada's bright future

BY COLIN TAYLOR

“The future of the contact centre industry in Canada is perhaps brighter than that of virtually any other country,” reports Colin Taylor, chairman and CEO of The Taylor Reach Group Inc., Ajax, ON.

He notes that India and soon China will see far greater economic impact due to their sheer size. Each will create more call/contact centre jobs next year than the Canadian economy will create in total jobs across all industries. However, he is quick to add that “size and economic clout isn’t everything. No one knows this better than Canadians who live and work and prosper in the shadow of the United States. We have very successfully found numerous niches and opportunities based upon the resources – natural and other.

“Canada has many resources that give us an advantage in the contact centre

space, including our culture of service,” he continues. “We have developed a strong service culture and millions of Canadians work in service industries today, so we are comfortable working in such industries.”

More than 200 different ethnic origins were reported in Canada’s 2001 census, cites the December 2006 issue of *Canada and the World*, published by R/L Taylor Publishing Consultants Limited in Waterloo, ON. At the time, the most common ancestries after Canadian, British and French were German, Italian, Chinese, Ukrainian and North American native. At the time, 18.4 percent of the population was born outside of Canada and immigrants were increasingly from Asia.

“Canada’s multicultural population means that we can source more native speakers in our major cities than any other

country can boast,” Taylor stresses. “This makes us uniquely qualified to operate global service contact centres operating in hundreds of languages.

He notes that the Canadian education system produces articulate, well-spoken graduates, with skills that are equal or superior to those in the U.S. or any other country.

“Of course as with virtually every element of our culture, we are linked to the U.S.,” he adds. “They are our largest trading partner and it should surprise no one that Canada is the preferred non-domestic location of choice for American companies looking at outsourcing or offshoring their contact centre operations. This has led to rapid growth in the Canadian contact centre industry over the past 20 years and will continue to do so into the future.” **cm**



Selecting a global location



BY PETER RYAN

Today's contact centre outsourcing market has more site selection opportunities than ever before, which can be both a blessing and a curse for many investors. No longer do vendors need to only choose from locations in India, the Philippines and Mexico, but once obscure markets such as Kenya, Costa Rica and Egypt are now among the leaders in year-on-year contact centre growth. The result for many potential investors has been confusion in where best to set up facilities for customer care. However, the one lesson that has become clear is that there is no set formula for choosing a global location. Rather, careful analysis is required, one that takes into account the following broad categories:

- **Goals of international relocation:** Many potential investors feel the need to relocate contact centre functions offshore or nearshore as they view it as the established solution to managing costs and recouping quality labour. However, while the offshore model has proven effective for many firms across industries, it is not practical in every case. Thus, the potential investor must analyze whether a move abroad will suit their business culture, as well as the needs of end users.
- **Vertical specialization:** Another point of contention among outsourcing prospects is the need to concentrate on end users of one or two vertical markets. This can be a challenge when deciding on the right location, as qualitative evidence suggests that some offshore markets are better suited culturally to some industries. The investor needs to investigate thoroughly established offshore contact centre deployments in their particular sector of business, so as to decide where best to look for talent.
- **Functional goals:** Investors in offshore contact centre services are likely to require a mix of support, including customer service, sales and marketing, as well as technical support. In such

cases, it is again prudent to determine if any offshore locations are better suited to any or all of these functions than others. Not only will this result in better end user handling, it will also mean lower attrition rates and agent satisfaction.

- **Language requirements:** In order to provide high-quality customer service, the agents serving customers need to have the best possible commercial and popular language skills of the end user. This means extremely cautious due diligence on the part of the investor in choosing the best location for their customer base and involves a great deal of understanding around accent acceptability and cultural sensitivity. Making the right choice can lead to higher customer satisfaction rates, while the wrong choice could mean caller drop-off and lost revenues.
- **Price threshold:** Many investors need to identify their maximum price point when looking at international sites. It is important to realize that not all locations are costed at the same level. For instance, investors looking at South Africa will find that it is significantly more expensive than Argentina. However, the level of service is among the highest anywhere. Thus, it is crucial that operators decide the price/quality mix with which they are comfortable before entering into any business arrangement.

Offshore contact centre choices are abundant, but also very confusing. By using a multi-pronged approach to identify the best location from the perspective of functionality, vertical specialization, language, goal and price, investors will be able to make the most informed decision possible and reduce the stress of a complex business decision. **cm**

Datamonitor analyst Peter Ryan can be reached at 514-680-1898 or pryan@datamonitor.com.



Call for Nominations

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CONTACT CENTRE CANADA is a national, not-for-profit organization comprised of representatives from the contact centre industry, labour, provincial contact centre associations, education and government. Its mandate is to understand and address industry challenges that have an impact on human capital, growth and sustainability in the sector.

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There are several openings on the Board of Directors which is attributed to the departure of Directors who have fulfilled their term of office.

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- 3. Responsibility for regional or national responsibility in, but not limited to, the following Province(s):**
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Upon receipt of submission, Contact Centre Canada will forward a complete information package to the applicant.

This project is funded by the Government of Canada's Sector Council Program.  **Canada** Ce projet est financé par le Gouvernement du Canada par l'entremise du Programme des conseils sectoriels.

www.contactcentrecanada.ca

Keeping Canada's world-class strengths

BY SUSAN MACLEAN

As one of the highest call centre destinations for the U.S., Canada boasts a healthy, world-class contact centre industry. About 20 percent of the industry is oriented to the U.S. market, according to John O'Brady, Prism Economics and Analysis partner.

The industry is a significant contributor to the Canadian economy as it employs about 450,000 Canadians or about four out of 100 working Canadians. Many more Canadians are engaged in providing services to the industry.

"We have a well-educated, relatively accent neutral, very service-oriented pool of labour," notes Donna Miller, chair of Contact Centre Canada, a federal government sector council established to contribute to the health and prosperity of the industry and its workforce. "Our expertise level is high because the industry is well developed in Canada."

Miller is among those who are looking down the road to ensure a continued healthy, world-class industry in the future. A Technology Roadmap initiative to assess the impact of emerging technology on human resources requirements and skills is one of the projects being undertaken by the sector council. One of the fact/opinion-finding methods of the group involved in that project was a one-day workshop on Feb. 23, 2007 in Ottawa.

Chaired by the project co-ordinator John Gelder, technologies discussed included service-oriented architecture (SOA) and Session Initiation Protocol (SIP).

Ernest Eisentraut, director, Engineering, Avaya Canada Corp., described SOA as being where Internet Protocol (IP) telephony was five years ago. He described SOA as a methodology of reusing chunks of software code to link what to date have been applications for either business or communication applications. He predicted that as the technological approach matures, more companies will use it to connect IT elements together and bring such benefits as rapid application development and reusing currently developed applications more efficiently and better sharing

and consolidating of resources within an enterprise. He suggested that SIP, where the business context is carried with the message, will be "the death of CTI" (Computer Telephone Integration) and will link in video, PDAs and other elements, changing the way service providers serve the enterprise. "It will enable more information to the contact centre, extending applications such as click-to-call," he said.

George Despinic, Product Marketing – Multimedia Apps at Nortel, noted that the main advantage of SIP is that it facilitates vendor interoperability so companies can get their phones from one vendor, switches from another, and so on. He sees

SIP as "great for video applications" and gave the example of a photocopy repair person showing tech support the problem via a cell phone camera. He also suggested that having professional agents with a camera so that you can hear and see them is a powerful way to build customer trust and loyalty.

Despinic also said that SIP will enable multimodal capabilities that would allow a customer-agent interaction to start off as a text chat session that can then include voice, then add in video, and then web collaboration – all in one session. He sees it facilitating a 360 degree view of a customer and boosting customer satisfaction by giving customers a choice of communication.

SIP also enables an application that Nortel calls "Expert Anywhere" where agents in a SIP contact centre can seamlessly collaborate with expert resources outside of the contact centre by using presence to locate an available expert and then collaborating with the expert via IM, voice, video or screen sharing."

Other participants included Rob Hahn with Markham, ON-based Orbit Group Partners Inc., who addressed the issue of ensuring your centre's coaching methods are effective. "People leave because they aren't getting the opportunity to be productive," he said. "A coach managing by numbers and a baseball bat demotivates the agent," he added.

Oscar Alban, principal global market consultant at Witness Systems, cited three areas that impact customer loyalty: the products or services for sale, the people who interact with the customer, and "the processes we give customers to do business with us."

Another presenter at the workshop was Tim Gordon, vice-president of operations for VIPdesk, Inc. whose topic "The CSR of the Future" described the company's success in developing virtual contact centres with a work-at-home workforce. Watch for our coverage on home-based agents in upcoming issues. **cm**

SECTOR COUNCIL SEEKS OPINIONS BY APRIL 2

As reported in our January/February issue, Contact Centre Canada would appreciate your input as part of its Technology Roadmap Initiative if you are directly involved in and providing internal support to contact centres and help desks.

The Technology Roadmap is intended to highlight expected and needed technologies and the impact that these may have on skill set requirements for the Contact Centre workforce. At the completion of this work, the Roadmap, including a summary of the research, will be available through Contact Centre Canada's web site.

The survey, developed and hosted by AtFocus Inc., the consultants commissioned for this study, should only take 10-15 minutes to complete and is anonymous. No direct reference to any of the survey participants will be disclosed.

The results of the survey will help Contact Centre Canada understand your perspectives on:

- key emerging technologies
- expected workforce skill gaps
- priority industry issues

This web link – www.atfocus.ca/survey_focus/view.php?isbn=CCC_TRM – at press time was to be active as of March 19. Your input would be appreciated by April 2.

Help with site selection

If you're planning a new call centre or are looking at relocation of an existing facility, there are a number of organizations waiting to help you make your decision. From local call centre associations to regional government bodies to private companies, you won't have a shortfall of practical advice, strategic data, incentives, assistance and networking options.

We've compiled a get-started directory of contacts you'll want to consider when locating a call centre in Canada.

2Ontario

www.2ontario.com/industry/callCentres.asp

Association des professionnels en developement economique du Quebec

M. Patrice Gagnon, Directeur general
www.apdeq.qc.ca

Barbados Investment & Development Corp

Kenneth Campbell, Regional Business Development Advisor
www.bidc.com

Bell Enterprise Solutions

Jeffrey Shave, Executive Director
www.bell.ca/ccsiteslection

Contact Centre Canada

Donna Miller, Director
www.contactcentrecanada.ca

Contact New Brunswick

Andrea Matchim, Executive Director
www.contactnb.ca

Economic Development Association of Alberta

Carlo Klemm, Executive Director
www.deaalberta.ca

Economic Development Association of British Columbia

Dale Wheeldon, Executive Director
www.edabc.com

Economic Developers Association of Canada

Penny Gardiner, Executive Director
www.edac.ca

Economic Developers Association Manitoba

Shelley Morris, Association Manager
www.edamonline.ca

Economic Developers Council of Ontario

Heather Lalonde, Director
www.edco.on.ca

Greater Toronto Marketing Alliance

Karen Campbell, CEO
www.staging.greatertoronto.org/home.htm

Invest British Columbia

Ian Mellor
www.investbc.com

LinxBC

www.linxbc.com

Ministry of Economic Development and Trade Science,

Technology & Services, Investment and Trade Division
Carla Tsambourlianos
www.ontario.ca

Nova Scotia Association of Regional Development Authorities

Holly Boston, Executive Director
www.nsarada.ca

Telus Canada

Call Centre Consulting Dept
http://business.telus.com/en_CA/National/products/Medium_And_Large_Business/Call_Centres/natMlbCallCentres.html

Saskatchewan Economic Development Association

Verona Thibault, Executive Director
www.seda.sk.ca

Site Selection Canada

Steve Demmings, President
www.sscda.com

Guide to Call Centre Associations in Canada www.contactmanagement.ca/associations
In addition, most cities, towns and regions have site selection and call centre relocation services.
Check with the individual cities for contact information. Find out more online at www.contactmanagement.ca

Headset choices for your agents

Even if most customer interactions continue to be via the telephone, can you afford to ignore the demographic and significant purchasing power of clients using non-voice channels?

Of the many challenges contact centres face, few are as noticeable to the outside world as having the right headset. And every contact centre knows the value their headset performance plays in achieving that “world class” contact centre reputation. No question that customers interpret what they hear, for better or for worse, and translate it to a value judgment of your contact centre’s ability to deliver on that level of service.

Challenges like cost containment with headset solutions that offer migration to IP telephony play big in any contact centre’s evaluation criteria. Not to mention the impact of durability, comfort and safety on a contact centre’s bottom line – because if an agent doesn’t like the headset, the customer hears that loud and clear.

Headsets with crystal clear sound and impeccable voice transmission can take a contact centre to the next level supporting advanced voice driven applications like IVR and speech recognition.

Advancements in sound quality like Digital Signal Processing (DSP) have become a standard part of a contact centres’ technology requirements. DSP filters out standing-line noise and adjusts incoming audio levels to maintain a safe and consistent volume throughout the call, ensuring superior sound quality and unprecedented acoustical protection.

VoIP compatibility

The Yankee Group estimates that in the coming year, 30 percent of North America’s contact centres will be joining the 17 percent already using Voice over IP. If your contact centre is moving to VoIP or any other voice-driven application, you may not have to do a rip and replace of your headsets along with

your other telephony equipment. Adapters are available that allow will allow you to take full advantage of VoIP now, with minimal investment.

Vonage Canada, itself no stranger to VoIP, knows that moving to VoIP is all about cost savings and cost containment. The company chose the GN Netcom 8110 USB Adapter to maximize headset ROI. Terry Chapman, Manager of IT, Infrastructure at Vonage Canada, found that the GN 8110 USB let them bypass their PCs sound cards and connect their GN headsets directly to the PCs USB ports. This helps eliminate sound card compatibility issues and improves sound quality.

GN Netcom began in the contact centre market and annually reinvests up to seven percent of revenue in research and development efforts to continuously advance headset technology. The company claims to be the world’s leading manufacturer of contact centre headset solutions and continues to develop and market new, innovative headset solutions based on its technological advances.

Wireless choices

Just as VoIP is changing how a contact centre processes voice communications, wireless headsets are changing how a contact centre simply functions. Once considered an indispensable tool for frontline supervisors, agents are now enjoying the multiple benefits of wireless headsets and, at the same time, boasting undis-

puted increases in productivity. Wireless headsets allow staff to stay connected while being able to freely move about the floor to retrieve documents, information and expert help “in real time” without the need to put a customer on hold. Just with ergonomics alone, wireless headsets keep contact centre staff comfortable and healthy.

Look for lightweight wireless headsets – weighing even less than an ounce, easy installation and the option of being worn as a headband, ear hook and, the most popular, neckband. Also, make sure the wireless range is adequate and the batteries will last a shift’s duration. Check if there is interference with the wireless data network. Be satisfied that the calls are secure.

The GN Netcom 9300 series of wireless headsets, for example, provides up to 300 feet of wireless mobility, six hours of PC talktime or nine hours of telephone talk time (additional batteries are available). DECT 6.0 wireless technology operating on the newly released voice only 1.9 GHz frequency offers WiFi friendly coexistence with wireless 802.11 data networks. Conversation security has been factored in, too. Voice transmission across all the GN 9300 series headsets is converted to a digital data stream that is encrypted using 64-bit encryption, making these wireless headsets secure.

The GN 9350 of this series is the industry’s first high performance wireless office headset to connect to both a standard desk telephone and a USB connection for PC-based IP telephony, according to Rob Petersen, Director of Marketing with GN Netcom. “The GN 9300 series has been developed to meet the growing demand for wireless office headsets compatible with traditional telephony and IP telephony,” he explains. “A contact centre can expand, or even change their telephone system without having to purchase new headsets. It’s future-proof.”



Photos: Courtesy of CTS

SOME HEADSET SOURCES FOR CANADIAN CENTRES

Anixter – Plantronics distributor
1-877-ANIXTER; www.anixter.ca

Canadian Communication Products Inc.
– GN Netcom, Plantronics distributor
1-800-661-4571; www.ccpin.com

Comfort Telecommunications Canada Inc. –
distributes Viking, Plantronics, GN Netcom
1-800-822-8613; www.comfortcanada.com

Corporate Telecom Services (CTS) –
GN Netcom distributor
1.888.827.7200; www.corptel.com

Headset Express – GN Netcom, Plantronics,
Viking distributor
1-866-298-8510; www.headsetexpress.ca

Sennheiser (Canada) Inc.
1-800-463-1006; www.sennheiser.ca

In addition to having DSP technology, the GN 9350's boom arm with noise cancelling microphone means your voice is always transmitted clearly. GN Netcom claims it is also the first wireless headset for IP telephony that features wideband audio. Its impressive 6.8 KHz audio bandwidth is more than twice that of conventional telephony. Not only does the high definition sound give the feeling of a true "face-to-face" conversation, it also helps increase productivity because every detail is heard the first time.

Both corded and wireless

Ottawa's public transit company, OC Transpo, chose GN Netcom's GN 8210 Digital Amplifier to provide the benefits of DSP technology to both corded and wireless headset applications, as recommended by Canada's largest GN Netcom distributor, Corporate Telecom Services (CTS).

"CTS understood our need for the superior sound quality that DSP provides while at the same time protecting our headset investment," says Benoit Proulx, Customer Service Centre Section Manager with OC Transpo. "While others suggested that we simply trade out our headsets, CTS recommended the GN 8210 digital amplifier with DSP technology to work with our existing corded headsets. This allows us to both receive and deliver exceptional sound quality."

The GN 8210 has an incoming volume adjustment feature that automatically keeps the volume of all incoming calls at the same user-set level. The adjustable audio/protection modes let the user tailor the headset to individual environments and preferences.

Selecting the right headset for your contact centre is one of your more important management decisions, given its overall impact on your agents, your customers and your investment. "The choice of headset technology is now a pivotal component to your overall technology strategy," says Scott Carrothers, president of CTS of Oakville, ON. "Know your options, and know just how far your headset investment will take you." **cm**

This article was based on information provided by Corporate Telecom Services Inc.

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Call monitoring for quality assurance

BY JOHN HUSSEIN

Everyone in the call centre industry today is exposed to some type of a quality monitoring process. Emerging new technologies re-shape the processes for enhancing the status quo, and good technology needs an equally good process to work with.

From a current Canadian call centre marketplace perspective, a typical set of tools for quality monitoring process in small/medium centres include:

✓ **Call recording system** Although many centres in the past three to four years have implemented server based digital call recording systems, there are still a number of centres utilizing the good old tape deck. New Canadian companies introducing solutions in this field are on course to revolutionize the industry – such as SoundRecall and Verbatim Enterprise.

✓ **Agent evaluation** The most frugal call recorders will still use an Excel spreadsheet as a scorecard. These are no longer necessary due to the advancement in new technologies and reductions in pricing. With labour-intensive manual process and lack of trending capabilities, ROI for some of the mid range automated solutions offering HTML based evaluation forms and reporting are usually within a couple of months.

✓ **Screen capture** This is a neat tool to identify the areas of agent weakness/strength in human-machine interaction. This option allows the supervisor to actually view the computer screen together with the call recording as the agent progresses through the call. Screen capture comes with a price premium and requires powerful servers and large hard drive storage capabilities.

There are three new “made in Canada” solutions available for the budget-conscious call centre manager that can provide significant impact in customer satisfaction and in-house process improvement.

Queue-based survey

Case Scenario 1 – Your centre has a qual-

ity-monitoring program and the agents are all getting high scores. But your customers are slowly leaving. You know that your quality program is designed to help your agents provide a higher level of customer service. How do you know if your customers are happy or not? (Hint – Have you heard the voice of your customer lately?)

Case Scenario 2 – You’ve just implemented a new call recording system and now have a gazillion recordings per agent per month. Who is going to listen and evaluate those calls?

One of the best “bang-for-the-buck-solutions” to augment the quality monitoring program is a Customer Survey Solution. This simple and affordable innovation has been around in the form of an IVR (Interactive Voice Response) for a while. But now, it has been re-engineered as an integrated module of the quality program.

Best Case Scenario – What if you get your customer to evaluate and score the call? It is possible if you have the right tools and process in place. Here’s how it works – after completing the call, the agent offers the customer the chance to do a quick survey (generally a draw for a prize will get more participants). If the customer agrees, the agent transfers the call (seamlessly) to the survey system. You can offer three to five clear and well thought out questions to your caller. One of your questions might be “Was the agent you just spoke with knowledgeable and able to provide resolution to your call today?”

Upon completion of the survey, the system links the survey information with the call monitoring info (recording and scorecard). Both sources of data are made available for reporting/analyzing.

With information right from the “horse’s mouth”, you now have multiple ways of

measuring the quality program. Since the ultimate goal of any quality process is to achieve customer satisfaction, you can compare the internal metrics with the customer feedback to tweak and make it more effective.

Other touch points for customer feedback are: a) while client is waiting in the queue; b) outbound call to the client; c) toll-free inbound call from client into the survey system, 24/7.

Record on Demand

In call centre environments where monetary and other important transactions are taking place over the phone, there is an overwhelming need for recording calls for verification and liability reasons.

If your centre is equipped with quality monitoring, the supervisor controls the recording schedules and calls are recorded at random. The agent does not have the ability to record at will.

Record on Demand (ROD) software, is a simple solution that allows agents to start/stop recording a live conversation as needed. This can be either manual – where the agent triggers the start/stop, or automated so that the recording starts automatically when a particular screen is opened at the agent’s desktop. It’s a great application for companies dealing with credit card transactions or need a proof of customer authorization. Voice files can be easily catalogued and archived based on business rules.

VoIP Recording

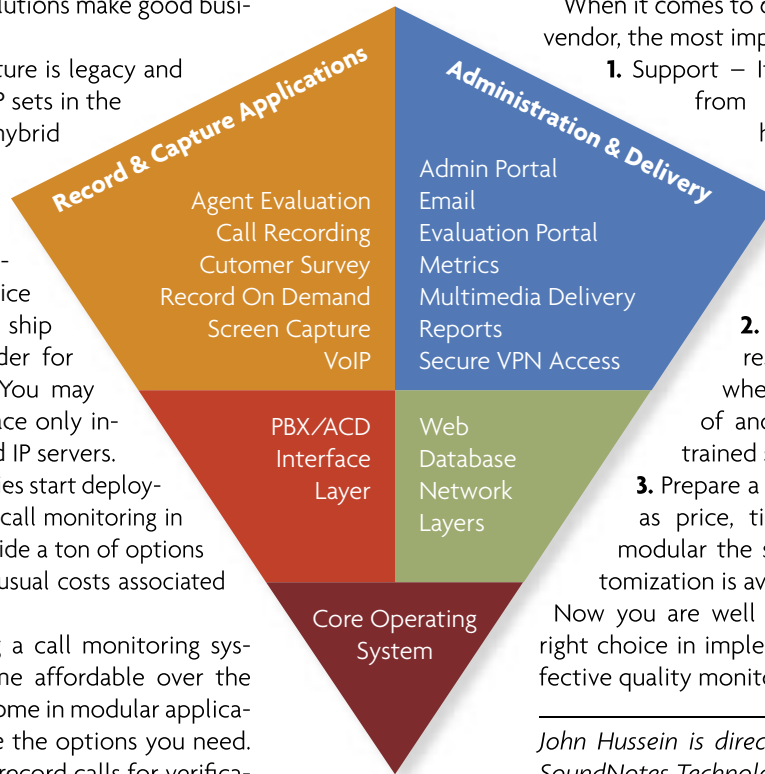
Many centres today are adding VoIP applications to existing legacy technology. For the traditional call loggers, it has been easier to record TDM calls than VoIP simply because of the nature of “constantly-evolving” VoIP applications and the older TDM based recorders simply do not have the architecture to support it. For companies that have larger legacy call recording solutions, replacing it with a fully IP system can be cost-prohibitive. This is where

creative “IP-TDM-Hybrid” solutions make good business and technology sense.

If most of your infrastructure is legacy and you need to roll out some IP sets in the call centre, this type of hybrid solution will capture the IP calls, provide a lot of intelligence on the calls for future data interrogation, then convert the IP voice packets into analogue and ship it to the legacy call recorder for cataloguing and archiving. You may choose to record in one place only instead of both the legacy and IP servers.

As more and more companies start deploying VoIP in their call centres, call monitoring in these environments will provide a ton of options for data mining without the usual costs associated with it.

Purchasing and deploying a call monitoring system is easy and has become affordable over the years. Most systems today come in modular applications where you can choose the options you need. For example, if you need to record calls for verification purposes only, all you need is to implement the record on demand application.



When it comes to choosing your solution and the vendor, the most important factors to consider are:

1. Support – It's always good to buy direct from the manufacturer as they have the best experts on the solution and hold the source codes to easily customize any part of the integration to suit your requirements.
2. If you are working with a reseller of the solution, check where the company is based out of and how many solution-specific trained staff they have.
3. Prepare a checklist of comparables such as price, time to deploy, training, how modular the solution is, what level of customization is available, etc.

Now you are well on your way to making the right choice in implementing an affordable and effective quality monitoring solution. **cm**

John Hussein is director of Enterprise Solutions at SoundNotes Technology, a Toronto-based company focused on quality monitoring applications. (John.Hussein@SoundNotes.com)

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Adding Value to Customer Relationshipssm

Great Canadian reading

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on ensuring all customer interactions result in satisfaction. Author Garry Schultz, currently vice-president of Global Support at Roxio, a division of Sonic Solutions, has deployed support services in over 20 countries during his quarter century of experience in this industry. Published by the American Society for Quality (ASQ) in 2003, the 274-page hardcover explores the many challenges in implementing a world-class contact centre and introduces methods, technologies and techniques to get it right the first time. <http://qualitypress.asq.org>

23 Steps to an Effective Call Centre is billed as “a complete model of call centre operations to assist businesses in reaching their goals.” In his foreword to the second edition, author Réal Bergevin explains he offers a simple, complete plan to achieve the goals of any call centre. The book is based on 10 years of observing and trial and error by this owner and CEO of the very successful NuComm International. The 130-page softcover was self-published in 2005 by NuComm Solutions of St. Catharines, ON. A chapter is devoted to each of the individual roles within a centre – manager, technology supervisor, analyst, scheduler, supervisor and service rep. Bergevin has also authored *Call Centers for Dummies* in the Wiley www.dummies.com series. www.nucomm.net



Call Center Operation – Design, Operation and Maintenance is aimed not only at call centre managers but will also “help CSRs understand the significant role they play in the overall operation of a call centre and in their organization’s CRM strategies,” notes Janet Sutherland, senior consultant at Bell Contact Centre Solutions in Toronto. Although the author Duane Sharp is a professional electronics engineer and corporate communications consultant in the IT sector for over 30 years, the book is not just technology oriented. Case studies describe successful strategies and present best practices from various business sectors. Published in 2003 by Elsevier Science (USA), Burlington, MA, the 304-page softcover offers concepts and guidelines spanning start-up and organization to workforce management and training. www.digitalpress.com **cm**



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Call evaluation helps firm get upsell program down pat

How are customers responding to the promotions and upsell efforts of your company's contact centre staff? Here's how one company found out.

BY HOWARD LEE

Call centre agents at Lillian Vernon, a 54-year-old catalogue and online retailer that markets gift, household, children's and fashion accessory products, spend a portion of every phone call offering promotions or upsells to customers. Some of these offers are for Lillian Vernon products or services, but periodically the company partners with a third party and offers that company's product or service (e.g., magazine subscriptions) to Lillian Vernon customers.

While this seems like a good idea, Lillian Vernon management wanted solid evidence whether or not the arrangement was profitable. In addition, management wanted to gauge customer attitudes to-

labour costs and compared to the revenue generated from these efforts. The ultimate goal was to better understand the ROI, if any, from making additional offers. In addition, Lillian Vernon's managers wanted to get feedback on customers that seemed irritated by additional offers. While there is no tangible data to measure the irritation factor, Lillian Vernon felt that the feedback could be instrumental in making a judgment on the relative worth of the additional offers. Since the success of Lillian Vernon's business depends on return customers, the company felt it was important to ensure they were not annoying customers with third-party offers.

“Based on the information we received, we implemented a variety of changes in our upsell programs.”

ward these offers, and subsequently address any customer dissatisfaction.

In order to assess the call centre's investment in offers and promotions, managers wanted to track the portion of each call devoted to upsells and promotions. Lillian Vernon's existing call management system tracked the total time of each call, but it was unable to track the duration of specific portions of each call. Specifically, from a typical call that lasts, on average, from seven to 10 minutes, Lillian Vernon wanted to track the duration of:

- call opening (the time needed to locate a customer's account/order)
- main presentation
- promotions/offers
- order confirmation (including the time to personalize a product, if necessary)
- upsell offers

Once the times were calculated, the time needed to make various offers and/or personalize an order was converted into

Lillian Vernon considered attempting to measure the duration of call portions internally, but it was quickly apparent that the company simply did not have the manpower nor the technology to capture this information on a regular basis – not to mention the lack of objectivity. Consequently, Lillian Vernon contracted with Seattle-based contact centre quality assurance (QA) firm HyperQuality, Inc., to conduct agent evaluations in its call centres.

Since the QA firm was already monitoring and evaluating calls, it made sense to use the evaluation service to track individual call components. In addition to the HyperQuality reports and follow-up, Lillian Vernon also received clear reporting on specific portions of calls, in order to better understand the ROI on various promotions.

The QA firm was able to quickly and easily build the time measurement function into the call monitoring and evaluations they were already performing for Lillian



Photo: Courtesy of Lillian Vernon

Vernon. In the first test, the consultants took a sample of 200 calls and captured the time taken by Lillian Vernon agents on every call portion.

The survey of Lillian Vernon phone calls revealed that for the in-house call centre, 14 percent of each phone call's time was spent offering internal promotions and upsells, while six percent of each phone call's time was devoted to third party offers. This information proved valuable in determining the direction of future promotions.

“Based on the information we received, we implemented a variety of changes in our upsell programs, including reducing some of our upsell offers and eliminating our third party offers altogether,” said Peg Porell, quality assurance manager of customer communications. “In addition, the company tightened up its scripting by revising the scripts for delivery times and call closings. These were sound business decisions that we could not have made without the data provided through HyperQuality's call evaluation program.”

As an added bonus, these changes allowed Lillian Vernon to realize a savings of 30 - 45 seconds on average talk time. With 100-150 full and part-time phone agents year round—and a peak of 750 - 800 during the holiday season from before Halloween through the end of January—this translated to a significant bottom-line impact. **cm**

Howard Lee is founder and CEO of HyperQuality, an independent contact centre quality assurance services firm based in Seattle, Washington.



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NuComm shares its global lessons

From its base in St. Catharines, ON, NuComm International owns and operates 14 contact centres in Canada, the U.S. and the Philippines. The company offers a peek into its global partnership and international site selection strategies.

Lately, news headlines are trumpeting opportunities and savings for businesses using offshore service providers. The contact centre industry, particularly, has seen jobs move to low-wage countries such as India, Central America and the Philippines.

Traditionally, Canada has been a near-shore provider of these services to U.S.-based businesses owing to the low value of the Canadian dollar. Until recently, that fact formed the basis for much of Canadian-based NuComm International's revenues.

The company handles millions of calls per month for a "blue chip" list of large, multi-national North American companies. Its centres provide technical and service support, customer care and billing, data management and customer self-service programs to some of the best-known companies in the cable, telecommunications, automotive, financial services, retail, media

and entertainment sectors. The company has been named one of Canada's 50 Best Managed Companies for six years in a row and was a 2005 recipient of the Canada Award for Excellence from the National Quality Institute. It operates in an ISO 9001:2000 quality managed environment.

With rising interest among U.S. customers in offshore alternatives that seemed even lower in cost, about five years ago NuComm's management saw it would be valuable to have a presence offshore.

Early global experiments

Initially, NuComm management opted for a business alliance with a reputable company in New Delhi, India. The rationale for structuring an alliance first was to: 1) investigate the true economies of scale; 2) understand the capabilities of offshore providers; and 3) determine whether an offshore provider could meet NuComm's

high standards and business methods.

"It was their company, their people and our work," says Clive Woodrow, NuComm's chief marketing officer. At that time, NuComm had a large base of customers in the cable and telecommunications sectors requiring responsive technical support and customer care. Early experiences with the first alliance partner were disappointing. The new India operation simply could not meet NuComm's expectations for quality of service and, as a result, would not meet its clients' requirements.

"The lessons learned in India were that it didn't work because, from a business culture standpoint, we were different organizations with different structures and different reasons for profitability," says Woodrow. "NuComm's management also concluded we had given our partner work that was simply too difficult for their skill-set without significant additional training."

Other challenges, he says, included “time zones and distance, call centre knowledge on their side and cultural differences. For example, CSRs in India had no concept at that time of cable TV and we had to teach them from scratch.

“Learnings, from our perspective, were that we did not provide enough training and we assumed a lot more about their knowledge than we should have. We also learned that training on a North American-specific product or service takes twice as long in an offshore facility.”

Advantages of a global presence

The driver, though, for investigating in an offshore site — a different cost structure — was still there for NuComm. To remain competitive, the company needed to offer U.S. clients an alternative to Canadian centres, particularly in light of a rising Canadian dollar.

NuComm CEO Réal Bergevin floated out the idea to the management team that another option may lie in Manila, Philippines. Manila offered many advantages over India. With similar low costs, Manila is culturally like many parts of the U.S. with an excellent education system and communications infrastructure.

Management had learned its lessons from India and opted to forego any alliances or partnerships. Instead, NuComm would establish a brand new facility of its own with NuComm trained and managed staff. Bergevin and other personnel scouted locations in Manila in 2003 and 2004, eventually confirming the viability of the project. Key personnel were recruited using NuComm’s own brand of testing and recruiting, and brought to Canada for several months of training.

The same business model that made NuComm successful is now in place in the Manila operations which opened September 2004. Manila’s management and front-line agents receive the same customer service training provided to NuComm’s North American agents and managers. Manila leverages the same cutting-edge call centre technologies and software applications. With about 225 agents, the Manila office is also among the few in the region operating within an ISO 9001:2000 quality assurance environment.

“If the business model is good, it should work anywhere.”

Even still, however, NuComm faced challenges. “Productivity is not as high in the early stages offshore,” he says. “That said, the quality of work is better. So, while initial cost savings are not immediately realized, they come quickly in time.”

Other partnering strategies

NuComm also knew from its partnering experiences that it was important not to be an absentee owner in an offshore facility. “We needed a company leader and specific client knowledge landed in the offshore country to drive our culture and our processes in the same way we do in North America,” he says. “Our goal has always been to take the same knowledge, processes and technology and move it to a lower cost country.”

By developing its own facility offshore, NuComm also proved its belief that: “If the business model is good, it should work anywhere.”

An important consideration in fulfilling that aspect was using the right technology. “You have to use the same technology overseas as you do at home,” says Woodrow. “There is no need to make offshoring more difficult by using different technology.”

In NuComm’s case, its Manila facilities are directly connected to the company’s main switch in St. Catharines, ON, via dedicated VoIP trunks from NTT Communications. “Manila is simply a five-digit extension off our main Avaya switch,” he says. NuComm also uses Citrix thin-client technology throughout its facilities, enabling the company to tightly control, remedy and launch applications from its data centre in St. Catharines.

Another lesson learned was to “hire local talent to help understand the local way of doing business, such as recruiting, hiring, compensation, benefits, etc.,” says Woodrow. “I know of one company that was

paying five times the going rate for Manila management staff because they did not invest in local talent to help them.”

The company’s experience with work quality in the Philippines has been outstanding. “The team there has an excellent work ethic and produces a very high quality service,” he says. “One of our account managers has moved all of his clients to Manila, resulting in a 40 percent cost-saving to his clients that is coupled with a consistently high level of quality.”

Strategically, NuComm is able to easily sell clients on Manila since it has the advantage of being a Canadian-owned and operated facility using the same processes and same technology as in North America, but lower cost structures.

As a result, NuComm is able to provide its customers with a choice of service options. “Clients can still keep high-value customer contacts in Canada, yet have the ability to move voice and or back-office transactions to a lower cost facility and yet continue to deal with the same company.”

NuComm also has lots of growth potential in Manila. Currently, available office space in the region is at a premium due to rapid growth. NuComm, however, has over 1,500 seats of capacity and can offer clients an “incubator” environment for testing customer care or support programs. “We have been able to provide turnkey facilities to our clients that allow them to test a program without the heavy commitment of establishing costly infrastructure, setting up their own company and staffing.

“For NuComm, our experiences in both India and the Philippines have been particularly valuable in one respect — that is, affirming the need to apply all aspects of our business model wherever we go and not relying on partners to follow our lead or somehow adopt our methods and technologies,” says Woodrow. **cm**



Technology beyond the call

Will contact centres play a key role in times of community crises and to provide support to people living alone, caregivers and community intermediaries? The technology is there to enable that, says NRC scientist.

BY SUSAN MACLEAN

In a public notice of Telecom Decision CRTC 2007-13 issued Feb. 28, 2007, the Canadian Radio-television and Telecommunications Commission (CRTC) allowed public authorities to use the telephone numbers and associated addresses contained in 911 databases, in order to improve the effectiveness of telephony-based emergency public alerting services, also known as community notification services.

“The contact centre sector in Canada, with its experience and infrastructure, is

well-positioned to assist in the implementation and operation of national emergency alerting services as envisioned in the CRTC’s Telecom Decision 2007-13,” comments Dr. William (Bill) McIver.

In fact, McIver contends that alerting the public could be an adjunct to traditional contact centre services if the communication technologies relating to extending CRM are applied to design contact centres “to handle life’s complexities.” It offers a proactive approach like a con-

cierge, “pushing” information on emergent weather conditions, for example. Enabling technologies for public alerting are Session Initiation Protocol (SIP) & Service-Oriented Architecture (SOA), XML-based Common Alerting Protocol (CAP), and fourth generation wireless and mobile mesh networks.

McIver is a research officer in the People-Centred Technologies group of the Institute for Information Technology within Canada’s National Research Council (NRC). The group’s research efforts focus on the broad scope of physical interaction, cognitive, communication and social issues involved in the use of information and

communication technologies. He is the director of the e-Citizen Studio, within that group, which examines and monitors various technologies. Creating a Citizen-Centric Multi-Channel Client Contact Centre was the topic of his presentation at a Feb. 23 workshop for the Technology Roadmap Project underway by the sector council Contact Centre Canada.

Mclver pointed out that new possibilities for alerting and emergency response have been created by telecommunications capabilities such as:

- immersive video environments
- mobility
- conferencing support.

He sees IP-based Web conferencing as a potential new mode of contact and collaboration allowing, for example, client problem observation. Video conferencing within a distributed contact centre could serve as a high end to Webinar (read on), and facilitate back office collaboration and distributed contact centre support. He suggested that synchronous and asynchronous video could be used for training both traditional and home-based employees.

Mclver speculated that a mobile form of contact centres could lend themselves to emergency response via a mobile ad hoc networking (MANET) or mesh networks. New networks could be set up quickly, as could location-aware and video-capable services tailored to mobile clients.

He stressed the cognitive power of visual communication and argued for contact centres to strengthen their services by using the visual medium. He addressed these six visual communication technologies as follows:

- IP-based video conferencing technology – ideal for communication between two to four sites and small to medium groups. Limitations are screen size and expensive hardware terminals including dedicated monitors, echo cancellation and robotic cameras.
- Webcasting, a one-to-many Web-based visual communication technology, ideal for multicasting a message to a focused community. Leveraging home or office PC broadband infrastructure, it allows “virtual hand raising” via instant messaging. Example: ePresence Live!
- Webinar systems – multi-way, multi-

Mclver believes that mobile contact centres lend themselves to emergency response.

user, interactive communication via Web clients; may be audio or audio + video with instant text messaging. Software licensing may be an issue for home users. Best suited for collaborating between single users at multiple locations and leveraging PC and broadband infrastructure. Example: Adobe Acrobat

Connect Professional, Lotus SameTime.

- Immersive collaboration environments, best suited for frequent collaborations, enable video conferencing with virtual same room experience as units are typically shown with multiple large format video screens. Example: HP Halo and the free Linux system ACE Grid.
- Video syndication using RSS (Really Simple Syndication) or Atom Syndication formats – establishes “channels” for content delivery (pull model), can be delivered on a subscriber basis. It can be used as web feeds and for text, audio and video.
- Mobile video communication – can extend data acquisition for contact centre functions. Third generation telephony can simultaneously handle voice + data. The data can be text, audio, video, global positioning system (GPS).

Mclver noted that the realities of public alerting today are that specialized warning systems are infrequently used. Such blessed infrequency has the downside of the difficulty in ramping up and recalling training when the need arises. Also, he said there is a natural tendency to be paralyzed by warnings. Overcoming paralysis requires a familiar source – like a call from a contact centre! – to be established so people know whom and where to turn to for emergency info on a regular basis and prescriptive information from well-informed front-line agents.

He added that this would require the aggregation of emergent event information currently on separate communication channels so it could be delivered to the most appropriate channels. Channels would have to be provided that would be appropriate for people with disabilities and all channels would need to be reviewed regularly.

The NRC’s mandate makes it available for collaborative research to examine leading edge ideas that might be of use to Canadian industry. Mclver can be reached at Bill.Mclver@nrc.gc.ca; <http://iit.nrc.gc.ca> **cm**

POTENTIAL TECHNOLOGY INVESTMENTS

In another presentation, Mclver cited the following as a Technological Roadmap for contact centres. How far along is your firm?

X-CRM (X = extreme)

- SIP + ...
- SOA
- Data integration

Hyper-channel access

- SIP + VoIP + ...
- Multicast & broadcast capabilities
- Channel interoperability–Voice-to-text, text-to-voice, ..., X-to-Y
- Aggregation of field data - Sensor networks, Smart cameras, Mobile/mesh networks,

XML-based CAP

- Next generation – Internet technologies - UCLPs, GRID
- Collaboration technologies
- Identify new channels
- Location-based services

Virtual boutiquing

- Collaborative filtering
- Adaptive agents
- Data mining

Life caching

- Data integration & federation
- SOA

Adaptive Info packaging

- Data mining
- Information retrieval
- Collaborative filtering
- XML/XSLT



Province of Québec: competitive skills and costs

The opening last year of a new TELUS call centre creating at least 150 new jobs in the heart of Montreal by the end of June 2007 was heralded by the Québec Minister of Economic Development, Innovation and Export, as proof of a favourable business climate.

“The fact that a high-performing and thriving company like TELUS chose to set up a call centre dedicated to businesses in the Montreal region shows once again that the province of Québec is a highly competitive place for companies that wish to expand their business,” stated Raymond Bachand. “The Government of Québec is pleased to announce that TELUS will obtain a tax credit for major employment-generating projects in the information technology sector.”

Such tax credits are managed by the government corporation Investissement Québec whose mission is to encourage the growth of investment in Québec, and thus contribute to economic development and job creation. In 2005-2006, the Corporation achieved its best performance since it was created in 1998.

The province of Québec offers diverse and well educated people that are able to function and perform in difficult niche markets such as insurance, financial services, technical helpdesk

and pharmaceutical sales, according to Jeanine Giorgi, vice-president, Canadian Operations, Protocol Integrated Direct Marketing. Giorgi is also on the board of l'Association du marketing relationnel du Québec (AMRQ).

She cites the province's other strengths as including Montreal's four universities – two French and two English – along with a multitude of technical colleges which attest to Québécois embracing higher education. A number of post secondary institutions teach call centre specific courses, further enhancing the competencies of agents.

The province also offers a multilingual labour force providing the ability to hire for specific language requirements. Québec has the largest rate of bilingualism of any province, with over 40 percent of residents fluent in more than one language. Apart from both English and French, substantial numbers of Québec residents speak Arabic, Italian, and Spanish. These language groups are concentrated heavily in the Montréal region, which is readily accessible for call centre outsourcers requiring employees to serve US, European, and Middle Eastern markets.

Giorgi says Québec can also boast:

- the varied management skill sets for swift speed to market and timely client

- responses;
- high quality facilities with state of the art technology;
- ease of transportation into Montreal's downtown via sophisticated public transportation;
- competitive real estate pricing;
- competitive labour market for large ramp up and scalability;
- government support for new start ups.

Geographically Canada's largest province, Québec highlighted call centres as an area of job creation. A report in 2003 by Datamonitor cited Invest-Québec as noting that contact centres figured prominently in the province's economy with 2,000 such locations employing 45,000 people within the province (including back office staff). Some of the vertical sectors served from Québec at that time included IT help desk functions (HP, IBM, Xerox), transport (Air Canada, Air France, Delta Airlines), pharmaceuticals (Bristol Meyers Squibb, Glaxo SmithKline, Merck Frosst), financial services (Royal Bank of Canada, American Express, Blue Cross). Key outsourcers include VoxData and Sitel. From a geographic standpoint, most call centres were then located in the greater Montréal region (79 percent), while the remainder were situated in Québec City and the South Shore. **cm**

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CPA event covers tips for dealing with irrational callers BY SUSAN MACLEAN

“Every customer service/call centre has them: callers who are irate, irrational, or just plain unreasonable. So what is a customer service rep to do? Appeal to the caller’s logic (when they appear to have none) or appeal to them emotionally? Try to take control, or back off and let the caller rant?”

That was the start of an invitation from Elizabeth Winter, founder of the Contact Professionals Alliance (CPA), to a breakfast meeting in Toronto on Feb. 14 on the topic of How to Satisfy Irrational Callers.

The guest speaker was Barney McNeilly, a former hostage negotiator who recently retired from the Toronto Police Emergency Task Force. Now the president of Canadian Critical Incident Incorporated, he explained how to create a dialogue and keep communication flowing with a caller, and emphasized the practice of active listening and the principle of reciprocity.

“Although every customer service rep is trained on how to manage irate or obscene calls, there are some situations that are particularly tough to handle,” noted Winter. “CSRs need every bit of finesse they can gather in order to deal with irrational callers.”

The CPS conducted a survey on the percentage of irrational calls that call centres receive and what triggers callers to become irrational in the first place.

Among the 20 centres who responded to the survey, 40 percent reported less than one percent and 33 percent reported only two to five percent calls are from irrational callers.

When asked what percentage of irrational callers are customers, 44 percent revealed 90 to 100 percent were customers calling while 21 percent said 20 to 25 percent were customers and another 21 percent cited none were from customers.

Although 80 percent of the surveyed do not have a list of callers who are blocked or banned, 20 percent do.

The most common reason that callers become irrational was cited by 40 percent as because the caller disagrees with company policy or the answer the CSR gives. About 13 percent reported that the caller’s expectation is beyond what the company can offer, with the same percentage citing an issue that is outside the call centre’s control, such as the design of bills or statements, marketing issues,

etc. Still another 13 percent report that callers are irrational from the beginning! Nearly seven percent said the CSR aggravates the caller by poor listening skills, etc. The same percentage said callers have bad chemistry with the CSR regarding language, tone, etc.

Are there certain times when more irrational calls arrive than usual? While 40 percent say no real pattern to the frequency of irrational calls, the fullness of the moon was given credit by 20 percent and pension/pay days by another 20 percent! Bills or statement days, cold/snow days and hot days also were cited by 13 percent.

None of the centres in the survey allow their CSRs to terminate the call without warning the caller, but 66.6 percent allow terminating the call after warning the caller once. Twenty percent had no policy and about 13 percent insist the CSR not hang up.

Winter also cited five examples from the survey of situations really difficult to handle. One caller called in 158 times in one day! Another caller wanted something that was not reasonable and would not take any other solution. Sometimes a caller is asking for too much and has a clear goal of getting something for nothing. Another example is a caller not agreeing to the company’s fees and threatening to complain to the Better Business Bureau and a lawyer. The fifth example was a repeat caller who was abusive and used foul language, etc. Although that caller was blocked from calling, the person started to call from friends’ and/or relatives’ houses.

Although not seemingly a huge issue

among the majority of contact centres, McNeilly noted that:

- workplace violence is the number one cause of work-related deaths for women;
- workplace violence is the second leading cause of death in the workplace, ranking just behind motor vehicle accidents; and
- three people are murdered on the job every day in the U.S.

In offering tips on how to satisfy irrational callers, McNeilly counseled CSRs to speak slowly and softly and avoid loud rapid speech. “Do not be afraid to ask questions. Seek to clarify the meaning of any statement.”

In creating opening dialogue, remain calm, steady and clear, he said. Be unchallenging, don’t make promises and avoid saying no.

His negotiation guidelines include:

- allow the caller to sound off;
- then try to get them to describe events as objectively as possible;
- review their description of events, place in a more objective, rational perspective;
- use empathy, but also point out the abnormality of their actions.
- He described active listening as including: minimal encouragements, paraphrasing, emotional labeling, mirroring, summarizing and silence. Listen for hidden meanings and motivations. Repeat key statements back in your own words. Concentrate on what is being said, not what you are going to say next. Make friendly overtures.

McNeilly warned against poor listening skills where “we merely take note of the informa-

see **Association News** page 30

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tion, not the content and feeling behind them...We hear only what we want to hear, allowing ourselves to be distracted and side-tracked into our own interests."

He also spoke about "the norm of reciprocity" where "when we receive goods, favours, compliments or concessions from others, it is our duty to reciprocate in kind. The norm is thought to be cross-cultural as all cultures appear to respect it." He gave the example of a negotiator providing a small favour, or making a small concession to the subject, and later asking for a larger favour in return. He said the net advantage goes to the negotiator.



ORCCA – Ottawa Regional Contact Centre Association

The Ottawa Regional Contact Centre Association or ORCCA is dedicated to the advancement of the contact centre profession

throughout Ontario's Ottawa Region. ORCCA hosts regular meetings, workshops and other special events that enable the sharing of ideas, the enhancement of industry skills and the opportunity to learn from experts about new developments and trends.

On April 26, ORCCA is sponsoring a half-day exclusive workshop billed as Workforce Management without the Technology – A Practitioners Guide to Understanding the fundamentals of Forecasting, Staffing and Scheduling Call Centres. Mike Webster with the Canadian Call Centre Advisory Group will cover the key basic principles and ground rules required for success in staffing and scheduling call centre resources. The focus will be on understanding the workforce management skills, knowledge and best practices required to be an effective and sought after supervisor or manager in today's fast-paced and dynamic call centre environment. The event will run from 8:30a.m - 12:30p.m. and costs \$299 to ORCCA members, \$345 for non-members. Further details and registration via info@callcentres.org.

ORCCA chair Sandy Freeman reports that the 2007 ORCCA Career Excellence Awards

Gala is set for May 23. Details will be posted at www.callcentres.org. Sandy Freeman can be reached at Freeman International (613) 723-2870.



MCCA – Manitoba Customer Contact Association

MCCA 2007 AGM, Trade Show and Conference May 15 & 16, 2007 at the Victoria Inn, Winnipeg, will kick off with a hot breakfast and keynote presentation with Greg Levin, Creative Projects Coordinator of ICMI, followed by MCCA's AGM. The focus of this year's conference is to provide information and tools to help contact centre leaders and frontline representatives face the challenges presented every day in Manitoba's contact centres. Workshops, breakout sessions and discussion forums will cover: multi-generations in the workplace; retention of existing workers; the respectful workplace; and what motivates employees to stay. Other guest

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presenters will be Dr. Danielle van Jaarsveld, Sauder School of Business; Eddie Calisto-Tavares of Options for Success; and Priti Shah of Praxis Consulting and others sharing their experience and skills with conference delegates. (204) 975-6464; info@mcca.mb.ca.

GTACC - Greater Toronto Area Contact Centre Association

Afshan Bye with Switchgear Consulting was the speaker at the Feb. 28, 2007 morning networking session hosted by the Ministry of Economic Development and Trade at 161 Bay Street, BCE Place – Suite 4040. Bye is a board member of Contact Centre Canada and brings experience at ING DIRECT Funds where her duties included being responsible for two service centres and all retail outlets. She spoke to the GTACC group about effectively managing agent turnover, citing how she helped reduce a 60 percent attrition rate to 20 percent in two years. Some of the techniques included mapping scheduling to lifestyles, creating a no surprises culture, better training and holding town halls on a quarterly basis. She explained that retaining the best employees is a better goal than merely reducing the attrition rate. Slides of her presentation are available at www.gtacc.ca. The next meeting is being planned for early May 2007. **cm**

coming events: 2007

- APRIL 17:** Symposium 2007 AMR-Postes Canada, Montréal, PQ; www.amrq.com
- APRIL 20 - 21:** CAM-X Call Centre Coaching Clinics, CSR & Supervisor Certification, Calgary, AB Linda Osip, 800.896.1054 linda@camx.ca
- APRIL 25 - 27:** Contact Centre Global Forum, Palais des Congrès, Cannes, France; www.ccglobforum.com
- MAY 5 - 6:** CAM-X Call Centre Coaching Clinics, CSR & Supervisor Certification, Calgary, AB Linda Osip, 800.896.1054 linda@camx.ca
- MAY 10:** 10th Annual Customer Service Conference - Spotlight on Customer Service, Interational Customer Service Association (ICSA) Toronto. Dolly Konzelmann 905.477.5544, dolly@icsa.on.ca
- MAY 14 - 16:** Alberta Call Centre Association ninth annual conference, Coast Plaza Hotel & Conference Centre, Calgary, AB. www.abcallcentre.com
- MAY 14 - 16:** CMA 2007 National Convention & Trade Show, Ottawa Congress Centre, Ottawa; www.the-cma.org/convention
- MAY 15 - 16:** MCCA AGM, trade show & conference, Winnipeg, Man.; www.mcca.mb.ca 204-975-6464
- MAY 23:** 2007 ORRCA Career Excellence Awards Gala. Details will be posted at www.callcentres.org. Sandy can be reached at Freeman International 613.723.2870.
- OCTOBER 16 - 19:** CAM-X 43rd Annual Convention & Trade Show, St. John's NL Linda Osip, 800.896.1054, linda@camx.ca

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