

AN INSTRANET WHITE PAPER

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# **Contact Centers In-Line™: A Functional Overview**

**Optimizing the customer experience by delivering contextual information across all customer touchpoints**



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## Executive Summary

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Phones provide an easy, versatile way for customers to connect with businesses – one of the key reasons why call centers continue to be play such a strategic role in ensuring high customer service and satisfaction. According to leading analysts, customer service and support has a 10 to 25 percent greater impact on customer loyalty and revenue than sales and marketing initiatives. But ensuring consistent, high-quality customer service is more challenging than ever for a number of reasons:

- Today's call center agents handle an increasingly diverse range of issues that nearly affect every aspect of a customer's experience with a business, from selling new products and services to supporting customers' use of them.
- As larger businesses use consolidated call centers that support multiple products and services, heavier burdens fall on a fewer number of call center agents, who in most cases, have difficulty finding the right information appropriate for each customer.
- Customers expect all of a company's channels, including call centers, physical retail outlets, and the corporate Web site, to provide consistent, accurate information. However, the content provided via these channels is created and maintained separately, resulting in inconsistencies and customer frustration.

To optimize customer service and satisfaction, agents and other customer-facing representatives need a revolutionary knowledge management solution that provides instant access to information supporting the complete customer experience.

InStranet's Contact Centers In-Line™ (CCIL) is the only multi-channel, fully integrated knowledge application that can be extended across multiple customer touchpoints. The solution is designed to be a real-time content creation and delivery medium for call center agents, providing them with instant, one-touch access to all information relevant to the complete customer experience. This access is enabled by the use of dynamic tabs that organize context-sensitive, customer-specific information into meaningful categories for agents. In effect, CCIL anticipates all potential customer issues for agents and automatically places needed information at their fingertips, eliminating the need for multiple searches.

This paper describes how CCIL's new approach to knowledge management is delivered via the following seven integrated modules or "desks":

- *An Agent Desk* that enables contact center agents to instantly find up-to-date, context-sensitive information relevant to the complete customer experience
- *A Self-Service Desk* that empowers customers to handle simple inquiries and look up information with the option of requesting additional support
- *A Sales Channel Desk* that delivers context-sensitive, customer-specific information to resellers, brokers, and retail outlet sales people who work directly with customers
- *A Publisher Desk* that supports the entire publishing process, automatically distributes the appropriate sales and servicing information to the right audience, and ensures that the knowledge base is up-to-date, consistent, and sustainable
- *A Trainer Desk* that allows managers and supervisors to monitor and measure agent knowledge
- *An Analyzer Desk* that provides a centralized set of tools to help content providers assess the value of content and ensure agent awareness

- *An Administrator Desk* that allows administrators to define all contact center aspects (i.e., users, content, and processes) from a centralized user interface

Together, these desks enable organizations to deliver accurate, contextual information across all customer touchpoints, resulting in increased customer loyalty, improved first-contact resolution, increased revenue with every customer interaction, reduced call volumes, and improved agent satisfaction.

## Rising to the Customer Service Challenge

Call centers continue to be the largest channel through which most organizations communicate with their customers and provide an easy, versatile way for customers to connect with businesses. What has changed in recent years, however, are the reasons that customers are

**Without a knowledge management solution that provides instant access to the right information, handling complex calls can be overwhelming for even the most skilled agents.**

calling. Today's call center agents handle an increasingly diverse range of issues that affect nearly every aspect of a customer's experience with a business and its offerings, from selling to supporting products and services. Industry analysts use a "customer experience wheel,"

illustrated in Figure 1, to capture the full range of customer needs and potential call center touchpoints.

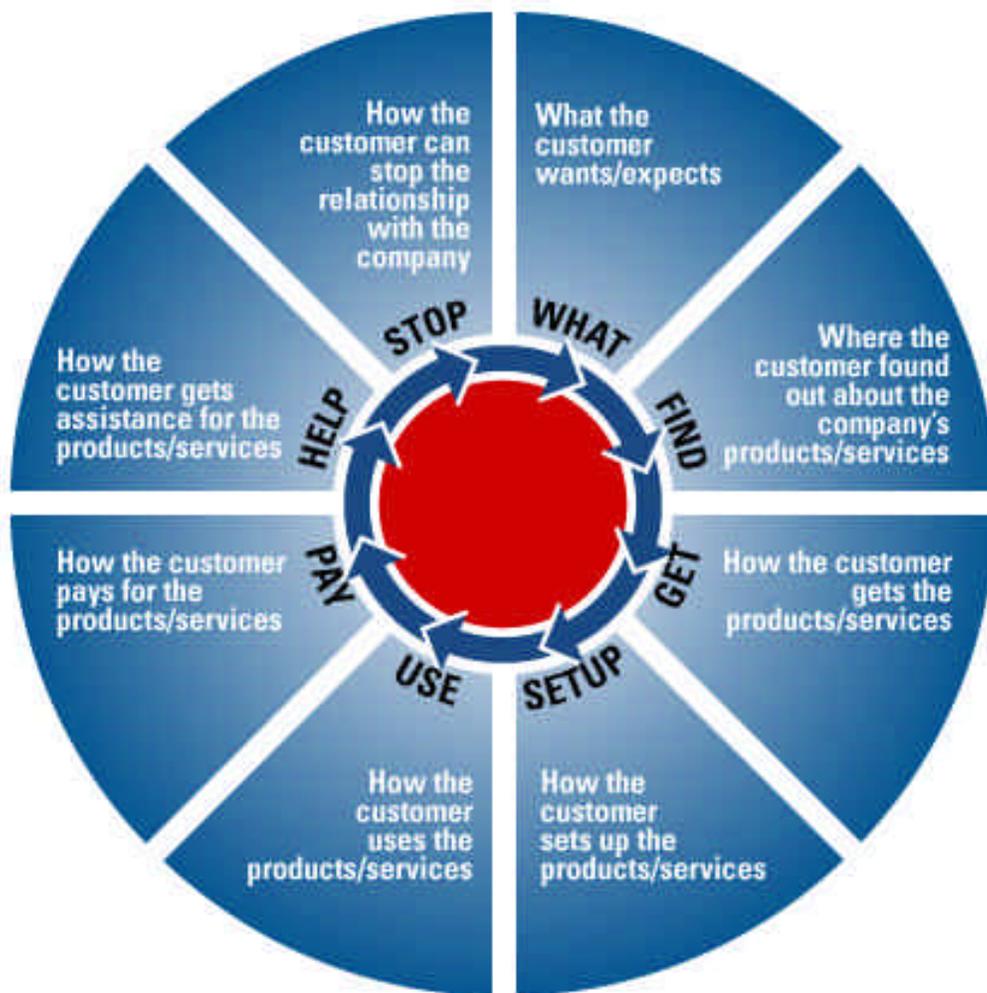


Figure 1: Customer Experience Wheel

The amount of information that agents need to access and understand in order to help customers is a function of the number and complexity of the offerings they support. As larger businesses seek to transition from traditional, siloed call centers that support individual products or services to consolidated call centers that support multiple offerings, heavier burdens fall on a fewer number of agents. Without a knowledge management solution that provides instant access to the right information, handling complex calls can be overwhelming for even the most skilled agents. At the same time, companies expect these agents to reduce average call times, increase up-selling and cross-selling, and improve first call resolution rates.

Simultaneously, many organizations are finding that customers appreciate when businesses recommend additional services that may be beneficial for them. For example, in a recent survey of banking consumers, most said they would like their bank to suggest new services that they may need. Yet the study found that 9 times out of 10, bank tellers and call center representatives rarely, if ever, suggest appropriate new products and services.<sup>1</sup> To make the most of customer interactions, companies need a knowledge management solution that provides employees with customer-appropriate up-sell and cross-sell offerings.

### **The Need for Consistent Information Across Customer Touchpoints**

Another critical driver for more effective knowledge management is that customers today expect all of a company's channels, including Web sites and regional sales offices, to provide consistent, accurate information. However, most companies maintain different information bases for each of these touchpoints, resulting in customers receiving inconsistent information – a frustrating experience for agents and customers alike. According to Jim Davies, Principal Research Analyst at Gartner, Inc.:

“Fully integrated customer service initiatives require customers to have their contact centers, points of sale, internal and external sales, and Web site in sync, in order to deliver full value to their customers. And this requires that all channels have access to the same knowledge base. But all too often, organizations invest in disparate solutions for their various customer service functions and have siloed pockets of customer information that's unavailable across the other channels, resulting in the customer often being treated as a stranger during their next interaction. This inconsistency across channels results in a poor customer experience and is detrimental to aspects such as customer retention, loyalty, and brand consistency.”

### **Information Access and Knowledge Management Issues**

Clearly call center agents play a strategic role in helping organizations retain customers and drive revenue. Yet many businesses do not provide agents with easy access to the accurate, context-sensitive information needed to satisfy customer needs and expectations efficiently. Instead, they offer agents the following:

- *Unstructured content:* Agents typically receive countless updates, policies and procedures, and internal communications from marketing and management. But they have difficulty navigating through this information for optimal efficiency and customer satisfaction – and may even receive contradictory information from different sources.
- *Ineffective search tools:* Companies often use intranets and knowledge management applications to help agents find relevant information. But to date, these tools do not help

optimize agent interactions with customers. Too much time is spent searching rather than solving problems and up-selling and cross-selling.

- *Inconsistent, out-of-date content:* Companies typically do not have an integrated content creation and publishing system, and as a result, the information provided by content creators is often out-of-date and inconsistent.
- *Ineffective training and monitoring:* Most call centers lack the training and monitoring tools to ensure that content is effective and understood.

**Customers get angry when agents place them on hold while they try to find the right information, or worse, provide them with information that is inconsistent with what they learned on the corporate Web site.**

As a result, customers get angry when agents place them on hold while they try to find the right information, or worse, provide them with information that is inconsistent with what they learned on the corporate Web site.

According to McKinsey, this kind

of poor integration between call centers and the rest of an organization can result in countless missed opportunities to drive sales and productivity, as illustrated in the following example:

"One travel-related company had more than 100 different promotions aimed at a variety of customer segments, including members of auto clubs and frequent flyer programs. Call center agents, however, were not adequately briefed on the components of each promotion or trained to sell them. Callers asking about the 'Disneyland special' would find themselves put on hold for several minutes while the agent found out that they were referring to the Disneyland vacation package offered through one of the company's club associations."<sup>2</sup>

This chaotic state of enterprise knowledge can impact businesses in other ways as well. First, it makes it very difficult for them to take advantage of low-cost, off-shore outsourcing of call center services. How can management expect foreign-based call center agents to successfully navigate a complex, ever-changing web of information quickly enough to provide fast, effective, personalized customer service? And second, given that the average attrition level for call center agents is 33 percent per year, poor knowledge management makes it extremely difficult to ensure that newly trained agents are

**Since attrition is so high, companies need a knowledge system that keeps all agents on the same page and able to offer consistent service levels.**

as knowledgeable as experienced agents.<sup>3</sup> Since attrition is so high, companies need a knowledge system that keeps all agents on the same page and able to offer consistent service levels.

### **Demand For a New Approach to Knowledge Management**

Given the challenges and growing customer demands, it's no surprise that for many companies, customer satisfaction is less than optimal. According to Esteban Kolsky, Principal Research Analyst at Gartner, Inc.:

"Customer service and satisfaction is a critical differentiator for companies today. The most successful firms will leverage a multi-channel knowledge application that empowers all customer-facing representatives to address customer inquiries quickly, efficiently, and consistently, no matter where customers are in their lifecycle with the company. The knowledge application should be able to manage all company sales and

service information to support every step in the customer service information lifecycle, across all channels, in order to optimize each and every customer interaction."

Equally important, the right kind of knowledge management solution can help companies reduce the direct costs of agent attrition. In general, agents are more satisfied with their jobs and feel less stress when they can solve customer problems quickly and efficiently. And according to McKinsey, lower attrition rates also lead to higher call center productivity because call centers have a greater number of increasingly experienced staff servicing customers.<sup>4</sup>

## Contact Centers In-Line™: A Multi-Channel, Fully Integrated Knowledge Application

Contact Centers In-Line (CCIL) is the only multi-channel, fully integrated knowledge application that can be extended across multiple customer touchpoints. The solution is designed to be a real-time content creation and delivery medium for call center agents, providing them with instant, one-touch access to all information relevant to the complete customer experience. When the solution is integrated directly with existing applications, such as telephony and CRM systems, information is provided to agents in a context-sensitive, customer-specific manner. The data in these systems is used as a filter against the CCIL knowledge base so that agents are presented with the right information for each call instantly.

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systems is used as a filter against the CCIL knowledge base so that agents are presented with the right information for each call instantly.

Using a suite of integrated desktops, CCIL supports every step in the customer service information lifecycle, including content development and publishing; agent information access, performance monitoring, and training; and customer self-service. As content creators across the enterprise use CCIL's Publisher Desk to populate the system's centralized information repository, other desks are used to ensure that agents read and understand the content and can access it in ways that optimize the outcome of every call.

Specifically, CCIL uses dynamic tabs to organize context-sensitive, customer-specific information into meaningful categories for agents (See Figure 2). For example, agents working for a telecommunications firm may need information organized into the following categories: product or service descriptions, availability, marketing, pricing, procedures, setup and configuration, incidents, outages, and competitor comparisons. By using dynamic tabs to instantly access context-sensitive information relevant to the complete customer experience, agents no longer need to search every time they have a question or issue to address. In effect, CCIL anticipates all potential customer issues for agents and automatically places needed information at their fingertips.

**In effect, CCIL anticipates all potential customer issues for agents and automatically places needed information at their fingertips.**

Once the call information repository is created, it can be extended to create a multi-channel knowledge management and delivery solution. Information in the repository can be repurposed and reformatted as self-service Web content, information for in-store sales teams and partners, and more, providing personalization specific to each channel. As a result, CCIL eliminates the need to create multiple content versions and knowledge bases and enables businesses to ensure that customers always receive accurate, consistent information across touchpoints.

**Once the call information repository is created, it can be extended to create a multi-channel knowledge management and delivery solution.**

The screenshot displays the Neptune Communications website interface. At the top, the Neptune Communications logo is visible, along with navigation links for HOME PAGE, SOLVE, FEEDBACK, and LOGOUT. A secondary navigation bar contains dynamic tabs: Description, Marketing, Availability, Price, Setup/Config, Incidents, Outages, FAQ, and Competitor. The main content area is titled "SmartPDA" and describes an email solution that pushes customer emails to a handheld device. A list of benefits is provided, including quick activation, always-on connectivity, email push capabilities, access to multiple email accounts, filter settings, and a multi-functional handheld device. An image of the SmartPDA handheld device is shown. A sidebar on the right lists related offers and options. The footer contains copyright and legal information.

Figure 2: CCIL Dynamic Tabs Provide Instant Access to Diverse Information

By providing each customer touchpoint with the right information at the right time, and establishing all representatives have read and understand the content provided, CCIL enables organizations to realize the following benefits:

- Increased customer loyalty
- Improved first-contact resolution
- Lowered costs per call
- Increased revenue with every customer interaction
- Reduced call volumes
- Improved agent satisfaction

## Integrated Desktops Deliver More Value

CCIL functions are enabled by a series of integrated modules, or “desks,” which allow organizations to seamlessly manage each step in the customer service information lifecycle. Users may be granted access to several desks, one desk, and even one menu of a desk.

As illustrated in Figure 3, CCIL desks are organized into two categories: front-office desktops and back-office desktops. Together, these desks help organizations manage the end-to-end processes required to optimize agent performance and achieve the following business goals:

- Answer more calls with less people
- Increase quality of service across all channels
- Reduce average call times
- Increase up-selling and cross-selling
- Increase first call resolution rates.



Figure 3: An Integrated Suite of Front- and Back-Office Desktops

## Front-Office Desks

The solution's front-office desks – which include the Agent Desk, Self-Service Desk, and Sales Channel Desk—help companies manage all customer touchpoints.

### Agent Desk

The Agent Desk enables contact center agents to instantly find up-to-date, context-sensitive information relevant to the complete customer experience. Using dynamic tabs, the desk organizes context-sensitive information about company products and services into meaningful categories. By using tabs to instantly access information, agents no longer need to search every time they have a question or issue to address. Everything they need is just a tab away. In addition, by integrating with telephony systems, the desk presents agents with appropriate, customer-specific content based on the call context.

The Agent Desk also provides other ways of accessing information, with areas of the user interface dedicated to presenting the following information:

- Targeted up-sell and cross-sell recommendations for every phase in the customer lifecycle
- Most-recommended documents relating to a topic (as rated by peers)
- Most-popular and frequently-used documents (based on peer use)

**The Agent Desk enables contact center agents to instantly find up-to-date, context-sensitive information relevant to the complete customer experience.**

## Advanced InStranet Search Capabilities

Only the InStranet Index Server offers all of the following search modes within a single search engine, ensuring that users can find all relevant content quickly and efficiently:

- **Lexical and Boolean searches:** Users can search for a word or set of words, applying Boolean operators (e.g., AND, OR, NOT).
- **Linguistic search:** Linguistic analysis allows users to find words in whatever form they take (e.g., singular, plural), as well as synonyms.
- **Statistical search:** Statistical analysis allows users to calculate the relevance of search results. **Semantic search:** The system will search for all words that are semantically close to those used in the query.
- **Mathematical search:** To optimize semantic searches, the system uses the global meaning of documents to ensure a closer association between the content of documents and specific queries.
- **Natural language search:** Users can search by typing a multi-word question.
- **Structured search:** Users can create a query to search the content of structured fields in the content database.
- **Search by navigation:** The system offers various navigation functions that let users pick from a list of answers, allowing them to re-focus the meaning of a query (e.g., search by example, refining, and concept navigation).

Table 1 summarizes the key features and business processes enabled by the Agent Desk.

<b>Table 1: Agent Desk</b>	
<b>Key Functions and Processes</b>	<b>Description</b>
Personalization	<ul style="list-style-type: none"> <li>• Provides each agent with a personalized briefing page showing customized, up-to-date content appropriate for his or her role and skill level (e.g., new products and offers, modified procedures, urgent messages, “what’s hot”)</li> <li>• Allows agents and managers to organize information to suit their unique needs (e.g., they can ensure easy access to documents they use most often)</li> <li>• Automatically collects and displays all the documents concerning a given context (e.g., an agent dedicated to answering technical questions might only be shown product FAQs, release notes, and other relevant documents)</li> </ul>
Field readiness management	<ul style="list-style-type: none"> <li>• Enables relevant content to be proactively pushed to agents automatically</li> <li>• Agents are alerted when new documents and content have been added and when they have been modified</li> <li>• Feeds pertinent information to the Analyzer Desk, such as which agents have not reviewed certain information</li> </ul>
Training	<ul style="list-style-type: none"> <li>• Allows agents to take advantage of ongoing training opportunities during contact center downtime</li> <li>• Enables agents to test their skills via quizzes, benchmark themselves against other agents, and complete training recommended by their super visors</li> </ul>
Solving customer problems	<ul style="list-style-type: none"> <li>• Uses tabs to dynamically assemble context-sensitive information about company products and services into meaningful categories</li> <li>• Can be integrated with telephony and CRM systems to deliver pre-filtered, contextual information before a customer interaction begins</li> <li>• Delivers a series of tools that allow agents to search and organize information according to their needs</li> </ul>
Up-selling and cross-selling	<ul style="list-style-type: none"> <li>• Gives agents dynamic recommendations and prompts them about up-sell opportunities based on the call type and customer profile</li> </ul>
Feedback management	<ul style="list-style-type: none"> <li>• Empowers agents to provide feedback to content creators, increasing the quality of knowledge base content</li> </ul>

The Agent Desk provides organizations with significant benefits and results, including the following:

- *Reduced training costs:* CCIL enables organizations to significantly lower training costs by simplifying the processes of creating, customizing, and scheduling training. In addition, by completing training when they are not taking calls, agents can maximize their productivity.
- *Increased revenue:* CCIL automatically pushes customized offers to agents based on the context of a call, thereby transforming calls into revenue opportunities.
- *Increased customer satisfaction and retention:* By providing agents with the resources needed to resolve questions upon first contact (and ensuring that agents read, understand, and

apply that information during calls), organizations realize increased customer satisfaction and retention.

- *Improved agent productivity:* CCIL filters and organizes massive amounts of information for agents and makes it instantly available to them, resulting in decreased search times and increased productivity.

### Self-Service Desk

According to leading analysts, sixty to eighty percent of calls made to call centers are simple and similar in nature, indicating that most could be handled via a personalized, 24-hour self-service Web site. InStranet’s Self-Service Desk enables customers to handle simple inquiries, look up information at their convenience, with the option of requesting additional support via email, phone, or online (or any combination). For example, many customers use the Internet to gather information and comparison shop, and then contact a call center or visit a local retail store to ask detailed questions and make a purchase.

**InStranet’s Self-Service Desk enables customers to handle simple inquiries, look up information at their convenience, with the option of requesting additional support via email, phone, or online (or any combination).**

As a multi-channel solution, CCIL simplifies the process of creating and maintaining content for Web-based self-service. Rather than having to maintain separate content for call center agents and the corporate Web site, organizations can re-purpose information contained in CCIL’s centralized information repository and “push” it out to an external or internal Web site. Organizations can choose to publish entire categories of content (organized via the same dynamic tabs used by call center agents using the Agent Desk), such as product or service description, availability, special promotions, and pricing on their external Web site.

Table 2 summarizes the key features and processes enabled by the Self-Service Desk.

<b>Table 2: Self-Service Desk</b>	
<b>Key Functions and Processes</b>	<b>Description</b>
Customer gateway and intuitive search	<ul style="list-style-type: none"> <li>• Allows customers to find content on their own quickly and easily</li> <li>• Provides powerful, multi-lingual, intuitive language search capabilities</li> <li>• Customers can be guided through a series of questions and presented with the appropriate answer via a decision tree – even when they don’t know exactly what they are looking for</li> </ul>
Customer behavior analytics	<ul style="list-style-type: none"> <li>• Tracks customer behavior from a global perspective to help organizations identify which offers are most effective, what questions are common for different customers, and more</li> </ul>
Channel and profile-based content	<ul style="list-style-type: none"> <li>• Allows companies to segment content intended for self-service or other channels</li> </ul>
Quick compare	<ul style="list-style-type: none"> <li>• Can be implemented so that visitors can make side-by-side comparisons of different offers and solutions</li> </ul>

The Self-Service Desk provides organizations with significant benefits and results, including the following:

- *Increased customer satisfaction and loyalty:* For customers that prefer finding answers themselves, CCIL makes it easy for them to access information quickly and ensures that it is accurate, consistent, and up-to-date.
- *Increased revenue:* CCIL eliminates the unnecessary distinction between service and sales by proactively recommending cross-sell and up-sell offers.
- *Reduced costs:* Because more callers can find answers themselves, there are fewer calls for agents to handle, resulting in reduced call center costs.
- *Increased agent productivity and lower agent attrition:* Because customers can use the Web to find answers to frequently asked questions, agents spend less time on repetitive queries, resulting in lower costs, shortened hold times, and better call center service for higher-need customers. This also boosts agent satisfaction, resulting in lower agent attrition and reduced recruiting and training costs.

### **Sales Channel Desk**

As a multi-channel solution, CCIL provides a Sales Channel Desk that delivers context-sensitive, customer-specific information to resellers, brokers, and sales people at retail outlets who work face-to-face with customers. The Sales Channel Desk provides the same functionality – and

**As a multi-channel solution, CCIL provides a Sales Channel Desk that delivers context-sensitive, customer-specific information to resellers, brokers, and sales people at retail outlets who work face-to-face with customers.**

access to the same enterprise knowledge base—as the Agent Desk. The content that users of the Sales Channel Desk actually see is adapted to their role for optimal user productivity.

For a more detailed description of the Sales Channel Desk functions, please refer to the “Agent Desk” section of this paper.

### **Back-Office Desks**

CCIL’s back-office desktops – which include the Publisher Desk, Trainer Desk, Analyzer Desk, and Administrator Desk—help companies manage teams, training, and knowledge.

### **Publisher Desk**

The final and most critical stage of any initiative is deploying the required knowledge throughout an organization. The Publisher Desk supports the entire publishing process, resulting in a knowledge base that is up-to-date, consistent, and sustainable. In addition, the desk automatically distributes the appropriate sales and service information to the right agents.

**The Publisher Desk supports the entire publishing process, resulting in a knowledge base that is up-to-date, consistent, and sustainable.**

Table 3 summarizes the key features and processes enabled by the Publisher Desk.

<b>Table 3: Publisher Desk</b>	
<b>Key Functions and Processes</b>	<b>Description</b>
Enterprise-wide content aggregation	<ul style="list-style-type: none"> <li>• Handles all types of content, in any format or source, in a single database.</li> <li>• Can be implemented to include a set of content management technologies that quickly aggregate information from multiple existing sources such as file systems, databases, and email systems.</li> <li>• Automates content aggregation, placing everything into one central, secured system on a scheduled basis</li> </ul>
Document structure definition	<ul style="list-style-type: none"> <li>• Allows content providers and team leaders to define document structures and templates for specific collateral types, such as datasheets</li> <li>• Presents agents with information in consistent formats, ensuring they can more readily and quickly navigate a document</li> </ul>
Content control and maintenance	<ul style="list-style-type: none"> <li>• Keeps knowledge up-to-date with time stamps and automatically notifies content owners of outdated information</li> <li>• Enables publishers to preview how a document will appear to agents (similar to the “print preview” option in word processing tools)</li> <li>• Includes a publishing calendar that provides at-a-glance status of all documents (e.g., what is going live soon, what expires soon, etc.) and keeps agents and managers apprised of upcoming promotions</li> <li>• Includes a notification tool that enables publishers to send reminders to content owners about content updates and to track who has completed updates</li> </ul>
Content creation	<ul style="list-style-type: none"> <li>• Allows knowledge owners to use the authoring tool of their choice (e.g., Microsoft® Word or HTML) and save documents directly into the CCIL knowledge base</li> <li>• Empowers content owners to publish documents without involving IT staff</li> <li>• Includes a form editor that allows organizations to send simple messages (e.g., alerts, headlines, reminders) to agents, preventing them from having to check different applications (e.g., email, LCD screens, etc.) or read paper notes in order to receive important messages</li> </ul>
Document distribution	<ul style="list-style-type: none"> <li>• Supports the complete publishing process, automatically distributing the appropriate content to the correct agent (e.g., it delivers content to all specified contact centers, to all agents with a certain skill level, or to all agents accepting calls from certain customers)</li> <li>• Alerts agents when new documents have been added or existing documents are modified</li> </ul>

Collaboration	<ul style="list-style-type: none"> <li>• Empowers organizations to manage the documentation process as projects</li> <li>• Provides tools that identify which existing documents need to be changed and determines the impact across the entire knowledge base</li> <li>• Allows publishers to define the workflow in the content creation process and to assign necessary tasks</li> <li>• Allows organizations to manage project details separately from the workflow, and uses a task assignment feature to capture and manage granular details</li> <li>• Provides a virtual workspace for group collaboration that centralizes project details, task assignments, and project and task status</li> <li>• Allows publishers to assign team members to projects, managers to organize and review the work being done and assign tasks, and project members to report on task status</li> <li>• Provides a shared library—a single repository—for multimedia images (such as logos) to ensure branding and image consistency</li> <li>• Can be implemented to include a notification feature that reminds project members to complete assigned tasks</li> </ul>
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The Publisher Desk provides organizations with significant benefits and results, including the following:

- *Improved productivity:* CCIL’s Publisher Desk helps content creators deliver accurate, valuable information to agents by automating project management and allowing publishers to use their preferred authoring tool.
- *Improved customer satisfaction:* By providing one entry point to publish to multiple channels, the Publisher Desk ensures that customers receive consistent, more accurate information across various customer touchpoints.
- *Reduced costs:* The Publisher Desk eliminates the need to create and maintain multiple knowledge databases for different channels, reducing the cost of content development and maintenance.

### **Trainer Desk**

Increased sales and superior customer service begin with knowledgeable agents who are empowered to meet customer needs. With the Trainer Desk, managers and supervisors can monitor and measure agent knowledge and identify where agents may require additional training.

**With the Trainer Desk, managers and supervisors can monitor and measure agent knowledge.**

The Trainer Desk provides organizations with tools to create, deliver, and monitor detailed quizzes on critical subject matter. It also enhances communication with agents by providing a way to manage incoming agent feedback, push information from the knowledge base to particular agents, and send live alerts and reminders.

Table 4 summarizes the key features and business processes enabled by the Trainer Desk.

<b>Table 4: Trainer Desk</b>	
<b>Key Functions and Processes</b>	<b>Description</b>
Skills scorecard	<ul style="list-style-type: none"> <li>• Provides managers with a snapshot of a team or employee’s performance</li> <li>• Enables drill-down on which agents, teams, or call centers need additional coaching or training</li> </ul>
Test creation and provisioning	<ul style="list-style-type: none"> <li>• Provides an out-of-the-box interface for creating multiple choice and free-form tests, complete with built-in workflows for approval and reviews</li> <li>• Allows test creators to associate tests with specific knowledge base items</li> <li>• Enables managers to assign or recommend training and quizzes to individuals or teams</li> <li>• Provides on-demand test results and allows managers to correct and advise</li> </ul>
Management of team readiness	<ul style="list-style-type: none"> <li>• Provides managers with a user simulation that allows them to see all documents that an agent has not reviewed and to send reminders to these agents to review the documents</li> </ul>
Agent self training	<ul style="list-style-type: none"> <li>• Allows agents to review training materials and test their own knowledge during downtime, as well as to compare their knowledge against peers</li> </ul>

The Trainer Desk provides organizations with significant benefits and results, including the following:

- *Reduced training costs:* By accelerating the learning curve, the Trainer Desk helps reduce training costs.
- *Increased agent productivity:* The Trainer Desk boosts agent productivity by making them more skilled, informed, and confident about their roles and how to fulfill them.
- *Higher customer satisfaction and retention:* CCIL’s Trainer Desk allows managers to identify skill gaps quickly and take proactive measures before customer service is impacted.

### **Analyzer Desk**

The Analyzer Desk helps content providers assess the value of content and ensure agent awareness. In addition, managers can measure how often documents are viewed and which documents agents have recommended. This measurement can be used to improve the quality of the information provided to agents. Managers can also determine which agents have (and have not) reviewed certain content, helping them ensure field readiness.

**The Analyzer Desk helps content providers assess the value of content and ensure agent awareness.**

Table 5 summarizes the key features and business processes enabled by the Analyzer Desk.

<b>Table 5: Analyzer Desk</b>	
<b>Key Functions and Processes</b>	<b>Description</b>
Live content tracking	<ul style="list-style-type: none"> <li>• Provides “live content indicators” that track which users need to review documents</li> <li>• Lets managers see which documents are the most popular, helps them analyze how agents are searching the knowledge base, and provides insight into which documents are the most helpful in resolving customer issues</li> <li>• Automatically pushes the most popular documents to the Agent Desk to populate the “Solving” section of the user interface</li> </ul>
Content effectiveness evaluation	<ul style="list-style-type: none"> <li>• Enables managers to track unread documents, measure content effectiveness, and assess agent readiness</li> </ul>
Reporting	<ul style="list-style-type: none"> <li>• Provides managers a way to determine the percentage of agents who have read certain documents and then drill down to compare results across different agent types, for example, experienced versus newer agents</li> <li>• Enables reports to be exported into spreadsheets for further analysis and distribution</li> </ul>
Agent surveys	<ul style="list-style-type: none"> <li>• Allows any document published in CCIL to be linked to a survey intended for the agents viewing the document (e.g., a satisfaction survey about a document or an evaluation of the sales impact of a document)</li> <li>• Sends survey results to the Analyzer Desk for viewing and analysis (e.g., managers can analyze the results of contact center agent surveys to gain additional insights)</li> </ul>
User feedback management	<ul style="list-style-type: none"> <li>• Allows agents to notify content owners directly if they find outdated or incorrect information in the content database</li> <li>• Captures and centralizes agent feedback so that it can be monitored, analyzed, and used to improve content quality and training (e.g., managers can turn feedback into training materials such as FAQs)</li> <li>• Allows supporting teams throughout the organization to review centralized agent feedback so that they can proactively address issues</li> </ul>

The Analyzer Desk provides organizations with significant benefits and results, including the following:

- *Improved content quality:* By identifying preferred documents and providing a content feedback mechanism, content creators can create more effective materials for agents.
- *Increased agent productivity:* Improvements in the quality of information available to agents – and enabling agents to instantly access the most popular documents relevant to a customer issue – result in increased agent productivity and efficiency and higher customer satisfaction.

## **Administrator Desk**

Knowledge solutions developed in-house typically require constant synchronization between the various applications enabling content structure, coordination, management, and display. CCIL's Administrator Desk eliminates these inefficiencies by allowing administrators to define all contact center aspects (i.e., users, content, and processes) from a centralized user interface. Administrators can quickly and easily classify and manage users and their roles/profiles (e.g., agent, manager, or supervisor) and determine what content in the knowledge base is accessible based on roles and profiles.

The Administrator Desk can also be integrated with other administration tools so that, for example, organizations wishing to share user log-in information between applications can opt to store the information in an LDAP directory. Administrators can store this log-in information directly within the application for a completely centralized set up.

With CCIL, administrators do not require special training or programming expertise to define sophisticated content organization and associations. They simply log in and define content structure and user privileges through pull-down menus. By defining the metadata and hierarchies of information, administrators control how information will be displayed across the various desk modules.

## Conclusion

InStranet's Contact Centers In-Line (CCIL) provides a comprehensive, out-of-the box solution with automated business processes to address the entire information lifecycle across all customer touchpoints. Designed to meet the unique and complex requirements of today's contact centers, CCIL:

- Provides an integrated, multi-channel knowledge solution that ensures consistent, accurate information is delivered across all customer touchpoints
- Enables fast, contextual information delivery
- Easily integrates with existing contact center systems and enterprise applications to ensure unified customer services
- Provides training and monitoring functions to ensure agent readiness and content effectiveness
- Offers a complete Web-based self-service solution that personalizes customer self-help
- Supports today's milestone-driven contact center interactions
- Offers reporting with key performance indicators to measure business improvement
- Provides powerful and simple-to-use administration tools

Built on industry-standard technology, CCIL is designed for fast deployment to deliver quick return on investment. By implementing CCIL, organizations can provide accurate, contextual information across all customer touchpoints, resulting in increased customer loyalty, improved first-contact resolution, increased revenue with every customer interaction, reduced call volumes, and improved agent satisfaction.

## References

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## Contact Information

### USA

InStranet, Inc.  
T: (312) 629 4570  
F: (312) 629 4571  
Toll free: (877) 932 5826  
info-usa@instranet.com

### EMEA

InStranet  
T: 33 (0)1 41 27 68 68  
F: 33 (0)1 41 27 68 70  
info-emea@instranet.com

[www.instranet.com](http://www.instranet.com)