



1999 e-CRM User Conference

CONTACT CENTERS
Portals into your Enterprise

Elizabeth Nolf
Product Manager



Agenda

**THE CHANGING ROLE
OF CALL CENTERS**

**THE BIG PICTURE:
CRM**

**WHAT DOES THIS
MEAN FOR THE
CONTACT CENTER?**

**HOW CAN IBM HELP
YOU MAKE THESE
CHANGES?**



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The Changing Role of Call Centers



Changing roles of contact centers through history

- 70s and 80s
 - ▶ telemarketing
- Late 80s
 - ▶ customer service, automated self service option
- 90s
 - ▶ integrated sales, service, support
- 00s
 - ▶ relationship management, assistance for self-service and e-commerce



A technology industry has emerged around contact centers

- Growth rates are estimated at around 45% per year
- Meta Group predicts the market will grow to \$4.7B by 2001, and \$10B by 2001/2
- Over the last 2-3 years, call center/CRM/front office technology companies have become a force in the marketplace, with publicly traded stock
- Market consolidation is occurring at a rapid pace
 - ▶ May 97: Baan acquired Aurum for \$250m
 - ▶ Oct 99: Peoplesoft acquired Vantive for \$433m
 - ▶ Oct 99: Nortel acquired Clarify for \$2.1B



The Big Picture: CRM

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Customer Relationship Management
encompasses the totality of
business processes which an
organization performs to
**identify, select, acquire, develop
and retain its customers.**



CRM: THE competitive differentiator

Customer Relationship Management Process

Market Management

Opportunity Management

Sales Management

Customer Support

Customer Acquisition

Customer Development

Customer Retention

Who are the profitable customers?

How do we attract them?

How do we deliver what the customer wants, how they want it, when they want it?

How do we build and sustain customer loyalty?



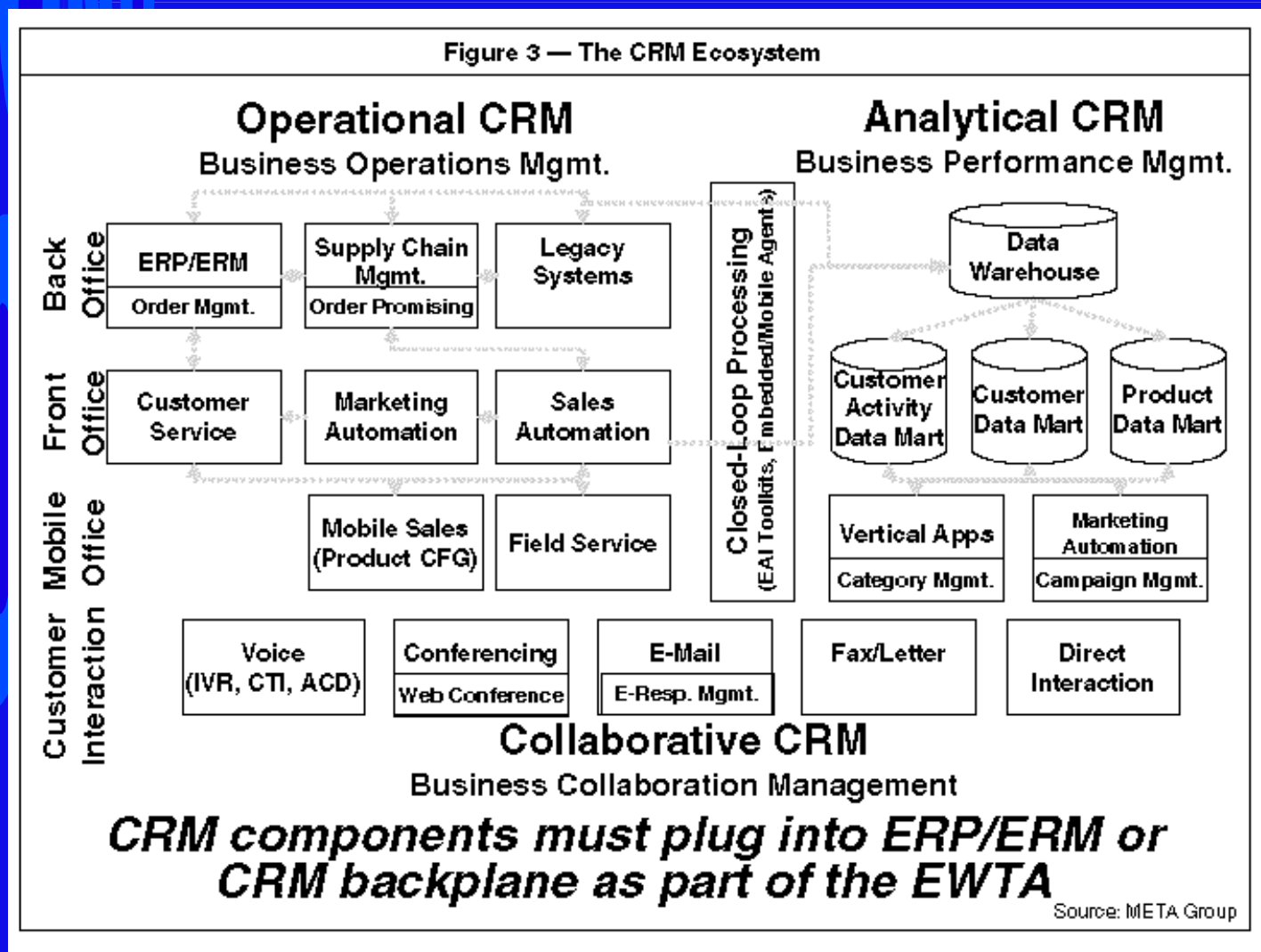
True Customer Relationship Management

- Continuous dialog across all customer touch points
- Personalization of products and services based on customer needs and expectations

At the core of successful businesses are abundant loyal and profitable customers

- Consistent user experience across all contact points that the customer chooses
- Real-time access to all customer information across the enterprise

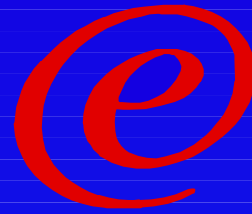
Meta CRM Definition





What is the key driver of change in CRM?

Answer: e-business.



An **e-business** is an organization that is **transforming** its interactions with customers, suppliers, business partners and employees **using Web technologies**, extending its reach to improve its performance



How does this affect the Contact Center?

- Expansion of customer contact methods to incorporate **non-traditional electronic channels** - web chat, web form, email.
 - ▶ Gartner predicts that companies will receive 25% of all contacts via email and web forms by 2001
 - ▶ Meta estimates that 35% of all customer contacts by 2001/2 will use non-traditional electronic channels.



Contact triggers have broadened...

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For Technical Advice call 1-800-535-4486 from 8:30AM to 5PM, M-F.

Fax Your Order 1-304-428-8271

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Print Name _____

Street _____

City _____ State _____ Zip _____

Gift Card Message _____

From _____

60A60	2	Product Name	ID	#11	\$00.00	\$00.00
Stock Number	Qty.	Name of Product	Page	Size or Style	Price Each	Total Price

Method of Payment: U.S. Funds Only

- Woodcraft Card
- Visa MasterCard Discover
- Optima American Express
- Check or Money Order (Do not send cash)
- C.O.D. Please add an additional \$6.00 to your order.

Shipping & Handling Charges:

Orders up to: \$20.00	\$5.99
Orders from: \$20.01 to \$40.00	\$6.99
Orders from: \$40.01 to \$60.00	\$7.99
Orders from: \$60.01 to \$80.00	\$8.99
Orders from: \$80.01 to \$100.00	\$9.99
Orders from: \$100.01 to \$200.00	\$10.99
Orders above: \$200.01	\$11.99

Foreign Orders - See Ordering Information on page 79.

Subtotal

Sales Tax* See chart below.

Shipping & Handling

See chart to the left.

Rush Shipping See page 79.

Sales Tax See chart below.

Shipping Method:

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 401-849-4455.

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 YOU MOVING? CALL US 7AM - 9PM
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 ANSWERED 24 HOURS A DAY.**

02	ACCOUNT NUMBER
	3-3105-009700-2
BILLING DATE	
JUN 16, 1997	

NOLF ELIZABETH S
 24 BEDLOW AVE
 BLDG/FL 1
 NEWPORT

RI 02840

PREVIOUS BALANCE 22.68
 PAYMENT JUN 10 22.68CR

METER NUMBER	RATE	FROM	TO	PREV. READ	PRES. READ	CONSTANT	KWH USE	DEMAND	BALANCE
54653	R1	MAY 15	JUN 16	55779	55938	1	159		.00
PLEASE PAY THIS AMOUNT									22.80
									22.80

\$ 1.39 OF COST ADJUSTMENTS INCLUDED (\$.00874 X 159 KWH)

ENERGY CONSERVATION REPORT				THIS MONTH YOUR AVERAGE COST PER DAY FOR ELECTRICITY WAS \$0.71
BILLING PERIOD	BILLING DAYS	KWH USE	KWH PER DAY	
THIS YEAR	32	159	4	
LAST YEAR				

*** RATE R1 SCHEDULE ***
 CUSTOMER CHARGE \$3.23 PER MONTH
 ENERGY CHARGE \$.11436 PER KWH

 **Eastern Utilities**
 Newport Electric Corporation

Newport Electric Corporation
 PO Box 15600
 Worcester MA 01615-0600
 TELEPHONE (SEE REVERSE SIDE)

YOUR NEXT SCHEDULED
 METER READING DATE IS:
JUL 16, 1997



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<https://www.fedex.com/us/contact/packagestatus.html>

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Package Status/Tracking FAQ's

To find a quick answer to one of the Frequently Asked Questions listed below, click on that question. Otherwise, [fill in the form below](#).

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- [How do I reroute a domestic \(U.S.\) package in transit or make an address correction to a shipment?](#)
- [How do I reroute a international package in transit or make an address correction to a shipment?](#)

Tracking Without an Airbill (Package Tracking) Number

- [How do I track \(check the status of\) a package/shipment without the airbill number?](#)

Signature Proof of Delivery for Domestic Shipments

- [Can I get a copy of the delivery signature?](#)

Delivery Address

- [What address was the package delivered to?](#)

Signature Release

- [Can I leave instructions to have the package left without a signature, if I am the recipient?](#)

Estimated Time/Date for Delivery



State/Province:	
Originating Country:	PLEASE SELECT U.S.A. ALBANIA ALGERIA AMERICAN SAMOA ANDORRA
Destination State/Province:	<input type="checkbox"/> (2-letter abbreviation - for U.S.A. and Canada)
Destination Country:	PLEASE SELECT U.S.A. ALBANIA ALGERIA AMERICAN SAMOA ANDORRA
How would you like us to respond? (Initial response may be through email, depending on the nature of the request)	<input type="radio"/> Phone Call - Please enter your telephone number. <input type="text"/> - <input type="text"/> - <input type="text"/> ext. <input type="text"/> <input checked="" type="radio"/> Email - Will be sent to the email address that you entered at the top of this form. Please verify your email address before sending request.
Question or Comments:	<input type="text"/>

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Getting Started

Frequently Asked Questions

My Z-Line

Assistance



We Value Your Feedback.

The Z-Tel Team is committed to deliver the access, service and tools you need to get the most out of the Internet and to improve the way you communicate with others. We will continue to challenge ourselves to refine our services that will continually satisfy our customers. In order for us to speed up this process, we want your feedback. If you have any comments or suggestions, please feel free to contact us through e-mail, Customer Service, or through LivePerson, which permits real-time chat.

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Call our Contact Center at 1-800-511-4572.
For Z-Line Home Edition call 1-800-995-2458.

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then choose whether you prefer to:

1) be connected by phone
(if you have a second phone line or direct connection to the Internet)

OR

2) be connected by live text chat

Whichever way you choose, we're here to help.



Customer Choice has a new dimension

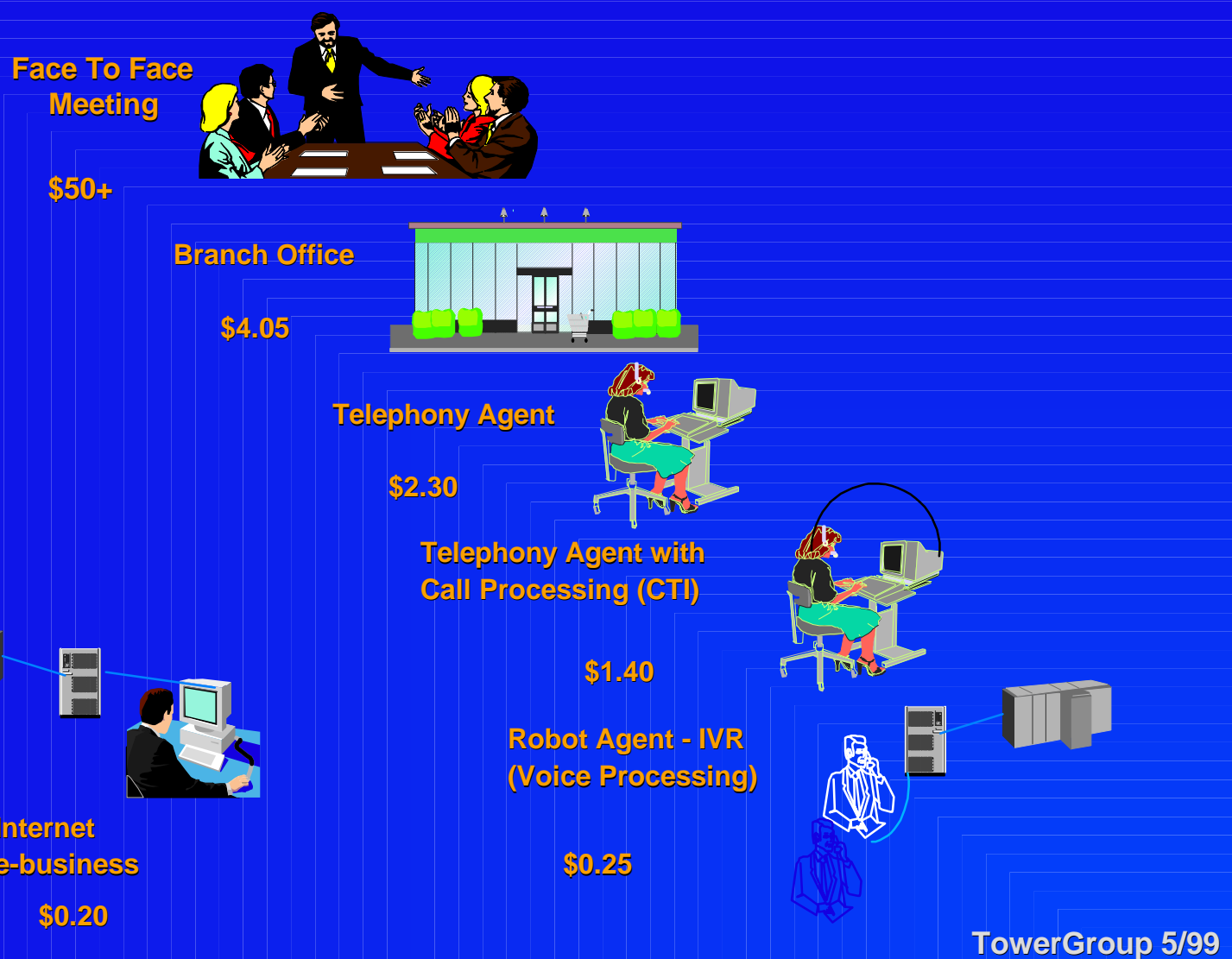
Customers want to use different access methods to contact your organization

For example....

1. Find best mortgage deal: **internet**
2. Account balance: **interactive voice response**
3. Mortgage application: **call center agent**
4. Mortgage contract: **face-to-face meeting**
5. Funds transfer: **internet**
6. Insurance: **call center agent**

Channel costs

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TowerGroup 5/99



CHANGE: BEYOND NEW CONTACT CHANNELS

- Blurring of lines between sales, service, marketing, support
 - ▶ cross-selling/upselling
 - ▶ technical support for self-service
- Blurring of lines between prospects, customers, supply chain
 - ▶ what is common, what is unique?
- New focus on importance of CRM to the bottom line...

CRM - A New Business Focus



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Establish & Maintain Customer Relationships

Transform Information Into Knowledge

Flexibility

Speed of execution

Ability to innovate

Quality & Continuous Improvement

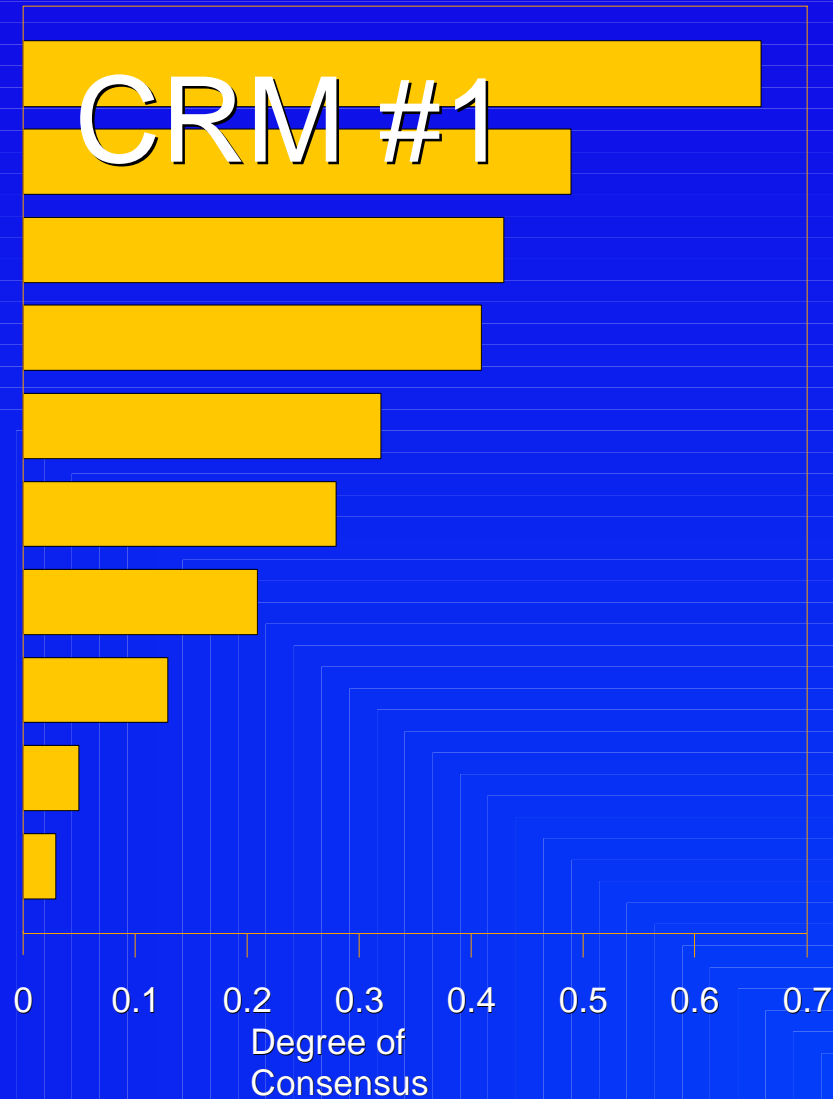
Cost position

Investment in HR

Supplier relationship

Brand image and equity

CRM #1



Mercer & Associates, 1998: Business Investment Focus
For Competitive Advantage Over Next 3 Years

The Sources Of Loyalty ROI



Cumulative Earnings





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WHAT DOES THIS MEAN FOR THE CONTACT CENTER?



The role of the Contact Center in a CRM "ecosystem"

- Assistance for self service
 - ▶ complement to traditional voice and non-traditional electronic self-service mechanisms
- Human interaction for complex sales and service situations
 - ▶ complaints, difficult explanations, emotional situations, exception handling
 - ▶ high end relationship selling



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Example: Handspring launches the Visor



- Home
- Products
- Software Links
- Developers
- The Company
- Customer Support

Site Map Shopping Cart

news & events

IF YOU HAVE NOT RECEIVED YOUR ORDER, AND YOU ORDERED BEFORE OCTOBER 20, READ THIS:

If you ordered product from Handspring before October 20th, and you have not received your order, this information will be important for you to review.

Handspring has experienced some systems problems in shipping initial orders that resulted from translating data from the order database to the shipping database. Most orders were not impacted, but for those orders impacted, several types of errors may have occurred.

Order status: We realize that many of you are frustrated that we are unable to give you exact order status, and details as to when your unit will ship. **If you ordered over the phone, you will be unable to check your order status on our web site.** All orders received in September are being considered the highest priority for us to ship. We expect to have all orders shipped no later than mid-November (and hopefully much sooner). We realize that we will have exceeded the 4-6 week guideline and possibly go out as late as 8 weeks for delivery of those initial orders. If you would like to cancel your order, you may do so by sending an email to [Customer Care](#).

Duplicate orders: Some orders were shipped, and billed to credit cards, at double (or more) of the original order. We have identified all of these orders, and have credited the additional unit on all customers' credit cards. Customers affected will be receiving a letter shortly with instructions as to how to return the extra unit(s) to us. Customers also will have the option of keeping, and paying for, the extra unit(s) as well.

Sales tax: Some customers were charged sales tax when they should not have been charged sales tax. We have identified these orders, and will be putting through credits for the amount of sales tax directly to these customer accounts within the next few weeks. You do not need to contact us to request this credit; it will be done automatically.

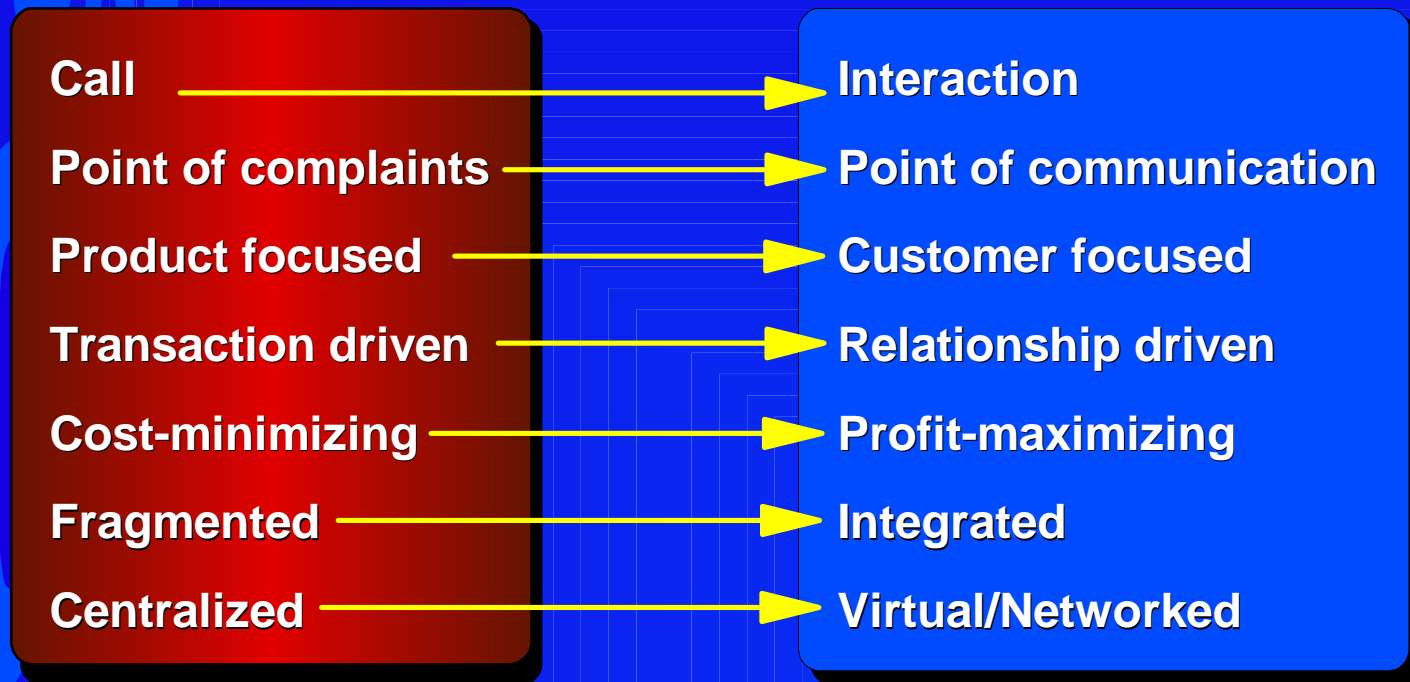
Serial cradle overcharge: Some customers were charged an extra \$20 if a



What changes have to happen?

- Enable new channels
 - ▶ implement the technology
 - ▶ maintain information flow for tracking
- Impact on staffing and management issues
 - ▶ written as well as spoken
 - ▶ multiple service level requirements
 - ▶ human contact skewed towards complex, high end
 - ▶ business as well as technical
 - ▶ sales as well as service
- Integration of new channels
 - ▶ universal queue
 - ▶ integrated customer data
 - ▶ consolidated tracking

A call center becomes a contact center



Call Center → **Contact Center**

- Voice
- e-mail
- Web
- Kiosk...



Evolution of Contact Centers

1st Generation

2nd Generation

3rd Generation

4th Generation

Startup

Mass
Production

Continuous
Improvement

One-to-One
Marketing

Driver
Culture
Measure
Process
Technology
Employee
Capability

Centralisation	Economies Of Scale	Process Optimisation	Personal Service
Control	Mass Production	Improvement	Differentiation
Cost	Thru-put	Quality	Market Share
Single Process	Multi Process	Departmental	Enterprise
PABX	+ IVR	+ CTI, Fax, e-mail	+ Business Intelligence +e-Business
Part-time	Hourly	Salaried	Empowered, commissioned
Help desk	Fulfillment	Customer Management	Relationship Mgmt

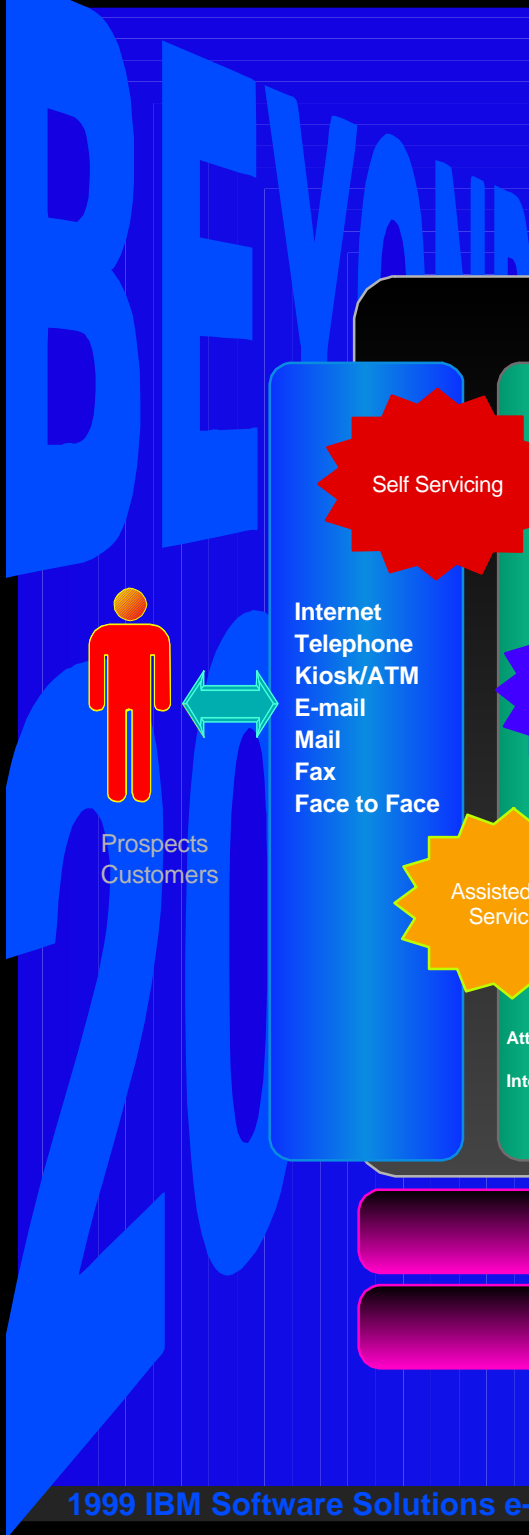


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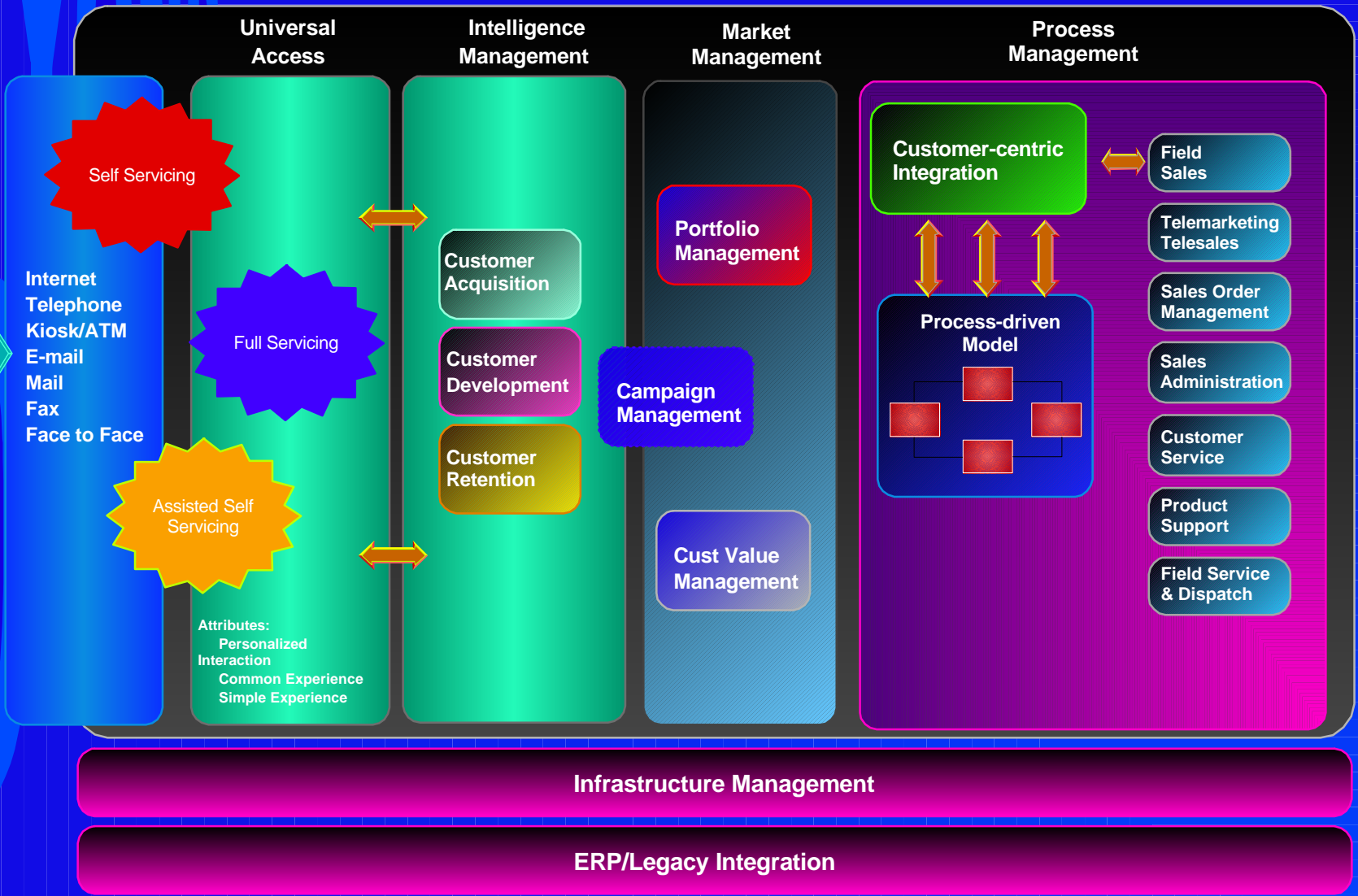
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How can IBM help you achieve this change?

CRM for e-business



Prospects
Customers



IBM CRM for e-business



Industry Verticalization

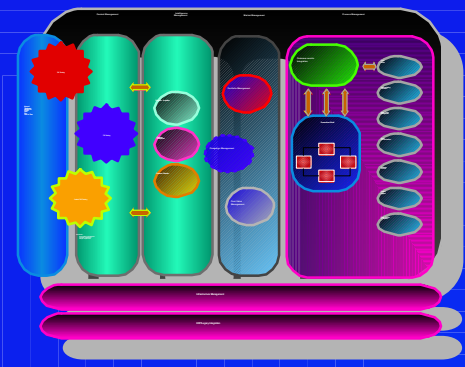
Consulting

- Business transformation
- Customer Relationship Management
- Customer Value Management
- Software
- Customer service
- Industry specific

Services

- Systems Integration
- Product Support Services

Architecture & Products



Partners/Alliances

Methodologies
Tools

ICM
Experience

Tools
Assets

Experience

Operations - Outsourcing



CRM for e-business - Reusable Components

Customized Applications

ISV, SI and Customer Applications

BI

Rel.
Mgmt.

Contact
Center

UA

Business Components

Common Business Objects
Customer Address, Exchange Rate, VAT

Foundation and Utilities Layer
Rules Mgmt, Content Mgmt, Workflow, Security, etc.

WebSphere, Domino

Solution Platform

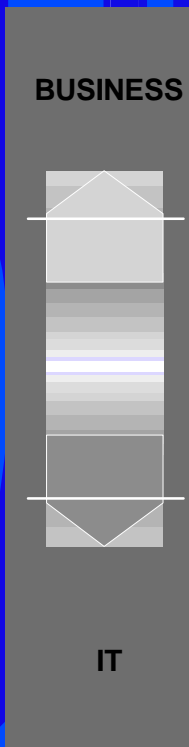
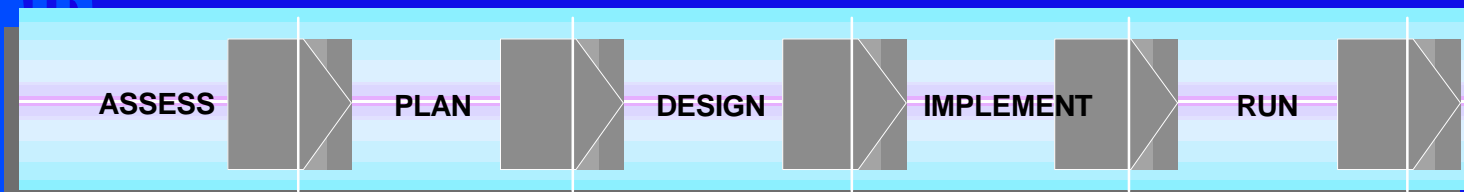
MQSeries, DB2, Visual Age

Server Platforms (AIX, NT, OS/400, Solaris, OS/390)



CRM Services Offering Framework

- Consulting
- CRM Services
- BPM/SO



- *Market Management Consulting*
- *CVM Strategy*
- *Routes-to-Market Consulting*

- *CRM Transformation Consulting*

- *Customer Contact Vision & Strategy Consulting*
- *Contact Ctr Business & Technology Assessment*
- *Sales Force Automation Business & Technology Assessment*

- *Customer Intelligence Mgt ***
- *Customer Market & Campaign Mgt***
- *Customer Contact Management*
 - *Contact Ctr Enablement*
 - *Solution Design*
 - *Package Selection and Impl*
 - *Telephony Integration*
 - *Web Integration & Collaboration*
 - *Other Channel Intergration*
- *Customer Information Access*
- *Mobile Sales and Service*
- *Field Service & Dispatch (Future)*

- *Billing & Collections*
- *Fulfillment*
- *Contact Management*
- *Campaign Management*
- *Customer Intelligence Management*

- *IT Managed Operations*

*** Currently for CRM BPM only*

Solutions (IBM & Business Partners)



IBM Software Strategy Elements

- Provide Application Enabling Platform (not applications themselves)
 - ▶ EJB-based Component Layering
 - ▶ Supports realtime, dynamic process operations
 - rules and workflow-driven
 - ▶ Proven e-business infrastructure
- Provide Universal Access Enablement and Management
 - ▶ Universal Contact Management
 - ▶ Universal Presentation
 - ▶ Dialogue Management
 - ▶ Sustained Dialogue
 - ▶ Speech Enablement



IBM Software Strategy Elements

- Provide Core Relationship Management Components
 - ▶ Data Mining/Warehousing
 - ▶ CRM Analytics
 - ▶ Analytic/Operational CRM Reciprocal Environment

- Provide Business Integration Middleware
 - ▶ Single View of Customer
 - ▶ Enterprise-wide, realtime integration
 - ▶ External (customer value chain) integration



Application enabling frameworks

- Visual Banker - e-CRM Enterprise Banking Solution
- Corepoint Contact Center
- "C4" - Corepoint Contact Center - Custom Edition



e-CRM Enterprise Banking Solution: an e-Commerce Cross Channel Application Framework

Channel Solutions

**Call
Center**

**Branch
Sales**

**Internet
Banking**

Teller

Deployment Enabler Components

Contact Center	Devices	Self Service	Information Exchange
Contact Center Mgmt	Cash Drawer Mgmt	Customer Profile	Chat
Interactive Scripting	CTI	Personalization	Network Collaboration
Task Queuing	MSR Readers		
	Passbook Printers		
	PIN Pads		
	Receipt Printers		

Financial Business Components

Customer Relationship	Personal Information	Sales	Service	Marketing
Contact History	Distribution Mgmt	Product Fulfillment	Service Operations	Campaign Builder
Correspondence	Work Management	Financial Calculators		Campaign Mgmt
Customer Information Management		Product Catalog		Query
		Product Presentation		Sales Tracking
		Product Recommendation		

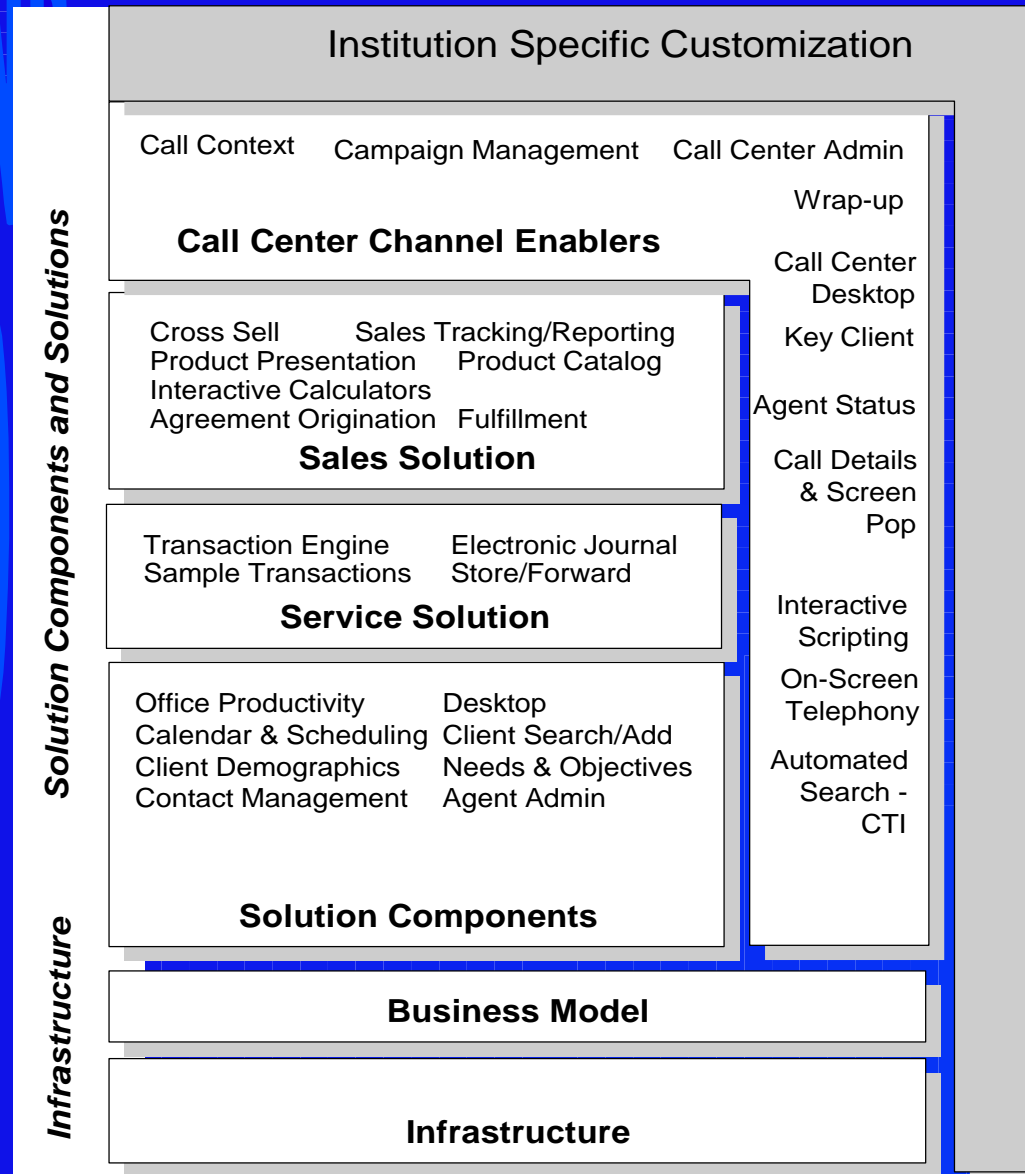
Foundation Components

Access Control	Exception Logging	Persistence	Scripting
Audit Log	Formatting	Printing	Session Management
Commands	Global Properties	Procedural Application Adptrs	Static Data Management
Constraints & Validation	Inference Engine	Procedural Data Access	Store and Forward
Desktop	Internationalization	Profiles	System Management
Electronic Journal	Logging	RDB Adapters	Transaction Mapping Framework
Encryption	Non-repudiation	Rules Framework	User Interface Components
Event Notification			Workflow



Call Center Solution Sample

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Corepoint Contact Center

- Starter kit for a customized contact center application
- Visual Basic components
- Components include:
 - ▶ Contact center desktop
 - ▶ Product catalog
 - ▶ Broadcast
 - ▶ Queue and task management
 - ▶ CTI integration to CallPath
 - ▶ Legacy integration via MDp

Queue Item Management

Current Queues

Items	Past Due	CSRs	Type	Name	Description	Priority
0	0	2	Back Office	ATM Dispute	ATM Amt Dispute	3
1	1	2	Back Office	Complaints	Complaint Resolution	2
6	4	2	Back Office	Customer Service	Complaint Resolution	2
2	2	3	Outbound	AAPT Business Prods	Satisfaction Followup	3
2	0	3	Outbound	AAPT Smartchat	Termination Recovery	3

Item in Selected Queue

Date Due	Time Due	Status	Customer No	Comments	Priority	Ref ID	Q Re
19980720	12:00	IP		Complaint follow-up	2		
19980720	12:00	IP			2		
19980722	10:00	TD	6102000010		2		
19980722	10:00	TD	6102000010		2		
19980722	10:00	TD	6102000010		2		

Action

Reassign selected items to Queue (only Queues within same Industry as selected Queue are shown):

Prompter

Good morning.

Thank you for calling our 24 hour Card hotline.

I understand you're calling about our new *Visa Copper* card.

Is that true?

(If yes...)

Would you like me to tell you a little about

Previous - F7 Next - F8

Skill Level: 3

Active Scripts: CardCampNotCust

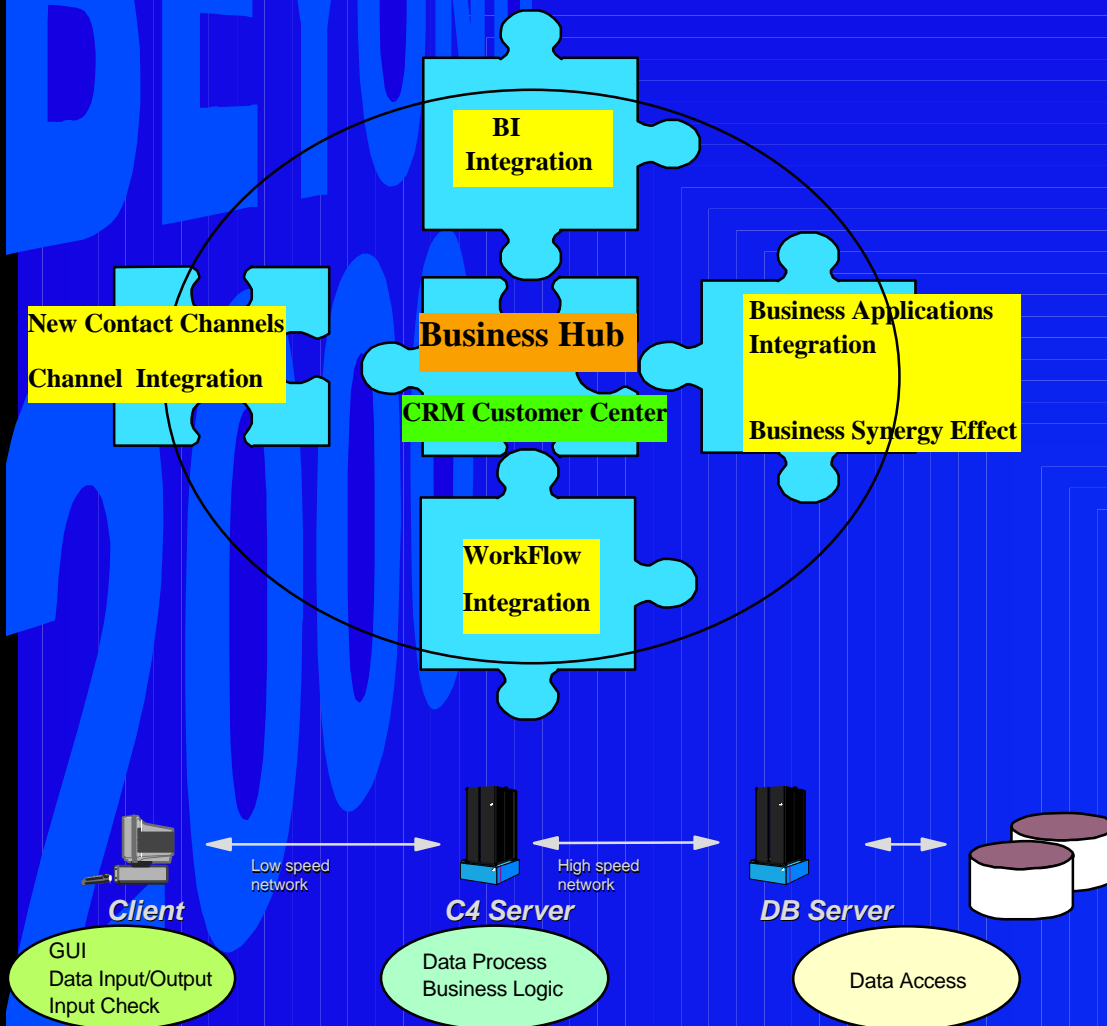
Objections Wrap Up

Close

"C4" avail. in Japan and Korea



Corepoint Contact Center - Custom Edition



Hub Functions to:

1. Add New Contact Channels (e.g. Internet) to Current Contact Channels and Integrate them
(New Channels, Channel Integration)

(New Channels, Channel Integration)

2. Provide Framework to Collect, Analyze, and Get 'Knowledge' from Customer DB Information, and Contribute to Business
(Business Intelligence (BI) Integration)

3. Link Customer Contact Information to Administrative/ Work Flow Process Seamlessly
(WorkFlow Integration)

(WorkFlow Integration)

4. Expand Single Business Application to Multiple Business Applications
(Business Application Integration)

(Business Application Integration)



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PARTNER APPLICATIONS



THE END

ANY QUESTIONS?



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CONTACT CENTERS
Portals into your Enterprise

Elizabeth Nolf
Product Manager