

The Unified Desktop

Pour your applications into a single view and bring your customers into focus.

WHITE PAPER

Cincom In-depth Analysis and Review



SIMPLIFICATION THROUGH INNOVATION®



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Executive Summary:

Expectations for Service Change When the Customer Runs the Show

There was a time – perhaps as recent as five years ago – when we could tell customers what to expect. But then the internet kicked in with earnest; it changed the way we do business, and changed customer expectations. Over the past few years, there has been an evolution; a power shift to the customer. Today's savvy customer understands that they now control the steering wheel, the gas pedal and the brakes. And that means every person, process and technology within your organization needs to realign to ensure that service becomes the differentiator.

Enlightened companies have shifted to a new business model where they focus on delivering outstanding customer service. And to do so, one of the critical tools these companies are utilizing is a Unified Agent Desktop that lets customer service agents respond faster and with greater accuracy and consistency every time a customer picks up the phone, e-mails or chats.

The Unified Agent Desktop pours your disparately located enterprise applications onto the contact center agent's screen, fully coordinated with all other contact center functionality. Instantly, the agent sees each individual customer as clearly as if they were sitting across the table from one another. Now for the first time, you can finally deliver a perfect experience for every single customer, every time you interact. This translates into huge cost and quality benefits for your organization.



"A growing area of concern for large contact centers is the amount of time agents waste switching between desktop applications, repeatedly entering the same data into separate systems – both during the call and in the post-call wrap-up phase."

– DataMonitor

The Age of Discontinuity

There is a lack of cohesion within most contact centers today, leading to turbulence, confusion and mistrust. This discontinuity becomes a barrier to meeting customer needs and achieving service goals.

Discontinuity in the contact center is especially damaging when agents are unable to meet customer expectations because required information is scattered across the organization – unreachable by most agents or, if reachable, only by Herculean efforts on the part of the agent. The culprit is the one we all know so well: information needed to address customer needs is locked up in disparate applications and databases – never designed to be easily accessible by people who need it on the frontline.



Information Everywhere – Except Where You Need It

Research verifies that contact center agents spend much of their on-hook time juggling multiple applications and point solutions to get the information required to interact successfully with a customer or prospect. Even routine customer-service interactions may require agents to interact with 10, 15 or even more systems – from green screen emulators and Windows client/server applications to browser-based screens. This often involves re-logging onto the system, re-entering their passwords each time they access another system and re-keying customer information. An agent can easily spend more time getting to the correct information than actually performing the work.

Meanwhile customers are sitting idle or are forced to confirm their account numbers over and over again as new back-end systems are opened.

This balancing act is a drain on agent productivity, IT resources and, worst of all, customer patience. Customers and agents alike know that their interactions shouldn't demand constant repetition and long wait times.

The New Age of Shared Information

No longer does the contact center need to be the center of turbulence, confusion and customer discontent. Breakthrough unified agent desktop technology consolidates and organizes the information needed to meet customer needs – no matter where the information resides.



This is the Unified Agent Desktop

It brings the customer into precise focus on the desktop. It turns the agent's screen into a hub that spokes out to all the enterprise applications and databases that are needed to respond rapidly to customers.

Any technological barriers that once prevented the instantaneous delivery of crucial documents or supporting resources to the agent desktop have been removed. The universal desktop serves as an "information clearing house" that delivers the appropriate information resources to agents such as the best insights from intranets, websites, PDFs, documents and spreadsheets as it is needed.



The unified desktop is at its core a knowledge enhancing tool, designed to provide agents with only the most relevant information and functionality to do their jobs, and only at the most relevant and appropriate times.

The Unified Agent Desktop can pay rapid dividends throughout the organization:

1. The Unified Agent Desktop takes the power inherent in each application that supports your business and places it all behind a single, coordinated interface. No more toggling in and out of applications. Every resource the agent might need – back-end applications, documents, directories, websites, intranets, maps – can now be organized and presented in real time on the desktop.
2. The Unified Agent Desktop makes multi-channel communications easier than ever before possible. Whether customers want to interact by phone, e-mail, web chat or fax, all of the incoming and outgoing interactions happen in this single interface for a consistent customer experience and accurate, comprehensive tracking and analytics.

3. The Unified Agent Desktop streamlines and guides the agent through inbound or outbound interactions with associated tools such as workflow, guided scripting and automated fulfillment. This is all meant to enable faster, more efficient interactions while the agent never leaves the desktop and never annoys the customer.

The result is an experience the customers want to repeat because agents are prepared to assist them. This, in turn, creates a profitable business capable of extending its unique brand promise to every touch point.

Bonus Functionality of the Unified Agent Desktop

Agent anywhere – The concept of “agent anywhere” becomes a reality with a universal, thin-client, customer service desktop. Because the knowledge is coordinated centrally, there is no need to maintain an individual library of corporate information on each desktop. Rather than relying on IT to deploy and update numerous custom applications on all kinds of laptops and remote terminals, company representatives can virtually access the desktop from anywhere with an internet connection. This not only speeds the deployment of virtual call centers, but makes it possible for multi-discipline staff to join a customer-service effort at any time, whether the need is created by a site shutdown due to a natural disaster or simply a heavy volume of customer inquiries.

Manager anywhere – Bringing the entire contact center in sync with the same customer-service desktop has a significant benefit for management reporting and understanding as well. As the agents benefit from a unified desktop, so do the managers. By simplifying managers’ desktops with a unified “command center” that provides quick access to all of the configuration tools, monitors and reports through a single sign-on, they are able to quickly obtain an accurate picture of their contact center.

For instance, a consistent view into post-call activity makes understanding the customer life cycle and retention trends much easier. Because all agents have the same tools and techniques at their fingertips, it is

possible to make meaningful, apples-to-apples comparisons between all of the agents on the service force. Other metrics, such as customer cost-to-serve and cost-per-sale are also free of distorting variables.

Management can also more clearly see the impact of call resolution, because call closure procedures are uniform. Compare that to a contact center using several customer-service desktop tools, where post-call procedures may differ by application and involve inconsistent closure status codes, or not even offer the same abilities to record the status of the inquiry and the customer’s post-call disposition.

Beyond the Contact Center – The Unified Agent Desktop view makes it easier for others within the organization such as Sales, Marketing and Finance to understand the customer-service business processes and tailor their own activities accordingly. For instance, marketing and the contact center can coordinate campaigns to ensure that the support staff is prepared for an increase in call demand or the new requests that will be generated by customer response. In fact, the thin-client accessibility of the Unified Agent Desktop enables employees and executives across the company to see the exact customer service experience, without the need to deploy additional technologies. The management and tracking capabilities enable post-campaign analysis to determine real results to continuously improve future campaigns.

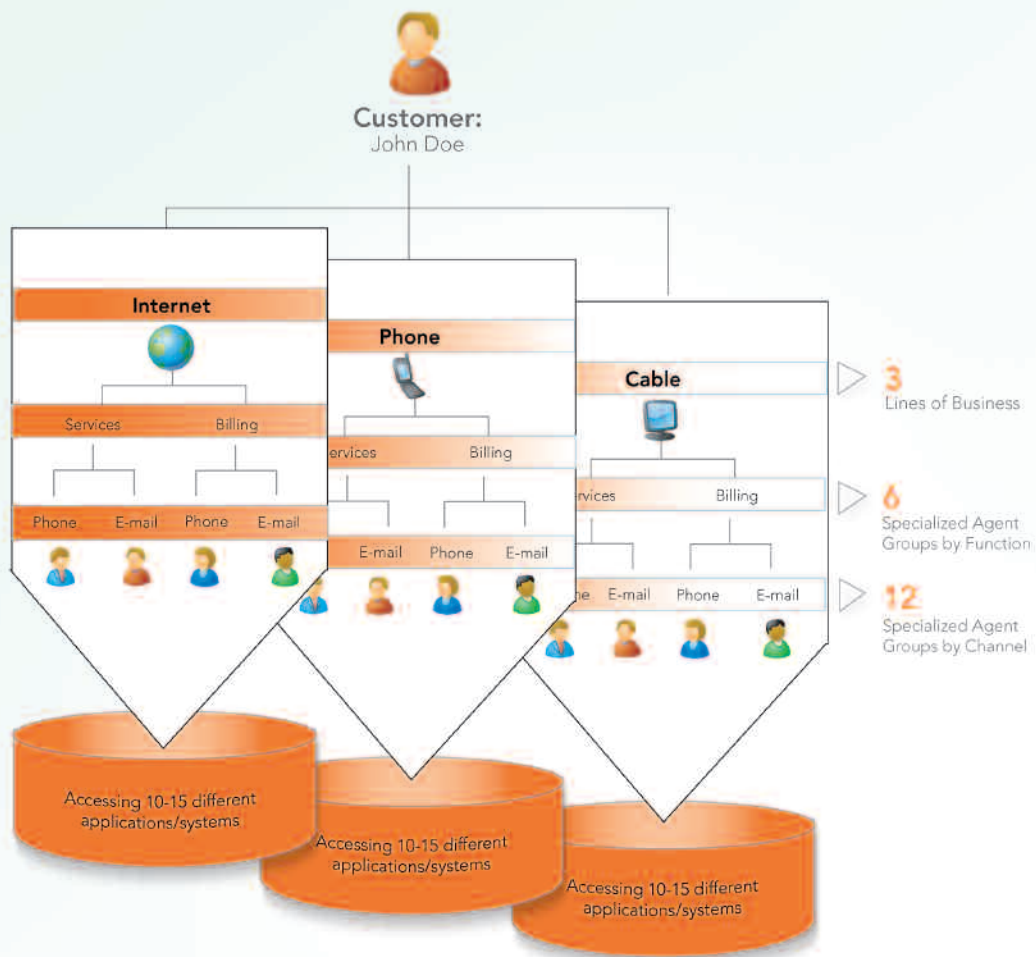
Large Cable Company Puts Unified Agent Desktop to Work

An Environment of Confusion and Turbulence

The situation was not good at one of America's largest cable companies. Each product line had its own team of customer service agents, divided further into subgroups based on interaction channel. Each group used different systems, processes and channels. All of them lacked access to customer information outside their own work group. This structure created operational and financial inefficiencies, and produced inconsistent and time-consuming service that led to customer dissatisfaction.

Every second wasted while agents flip between applications or terminal screens is a second not spent building customer value.

Cable Company Before Synchrony: **Specialized Agents/Disparate Systems**



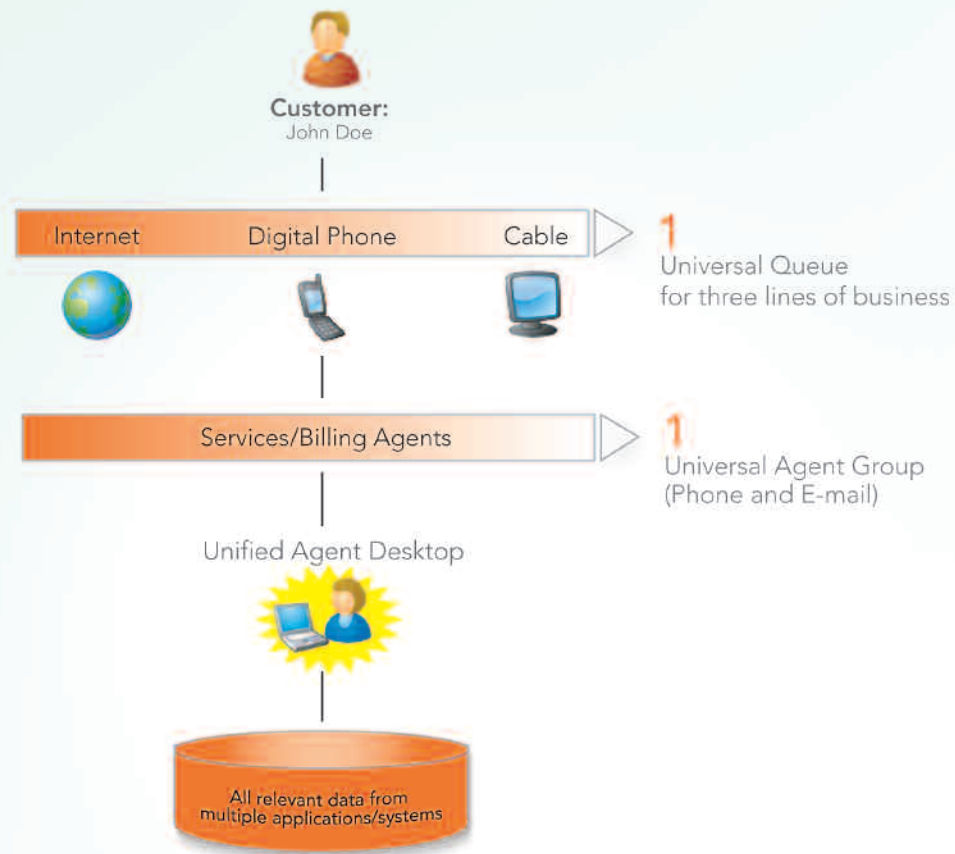
Enter the Unified Agent Desktop

Unified Agent Desktop technology changed this chaotic environment into a contact center where every agent provided improved customer responsiveness. In a space of just 45 days, the system was deployed – including requirements gathering, solution design, configuration customization, knowledge base and scripting setup and integration of over 50 applications, data loading, testing, training and rollout.

Implementing Synchrony’s Unified Agent Desktop delivered dramatic results:

- Agents were now utilized across all product lines for greater productivity.
- Average handle time dropped 77 seconds, contributing to a three-month ROI.
- New agent training was reduced by three weeks, saving \$5 million annually.
- Eliminated 10 minutes in system log-ons.

Cable Company After Synchrony: **Universal Agents/Unified Desktop**



How the Unified Agent Desktop Creates Value

The Unified Agent Desktop pours your disparately located enterprise applications onto the agent's screen, fully coordinated with all other contact center functionality. Instantly, the agent sees each individual customer as clearly as if they were sitting across the table from one another. The result is increased quality and decreased operating costs, leading to one of the most rapid ROIs in the industry.

Single 360-degree View of the Customer

One of the primary benefits of a Unified Agent Desktop is the single 360-degree view of the customer. Armed with this critical insight, an agent can more quickly understand the complete picture of the customer's relationship with the company:

- The best unified desktops show each customer as a single contact entry that may be referenced by a variety of unique identifiers, such as a phone number, account number or contract ID, as examples.

From this identifier, a Unified Agent Desktop acts as a customer activity hub that displays not only all customer-service tickets, but also a customer's purchase, billing, and miscellaneous service activity throughout the entire organization. Billing discrepancies and service interruptions, for instance, can rapidly be correlated by an agent who is provided with these essential facts.

- At any time during a customer interaction, the Unified Agent Desktop provides the necessary tools to escalate or transfer the contact for quick resolution without requiring a lengthy hold-and-transfer period.
- Because all activities are tracked, the escalation process appears virtually seamless to the customer.

Efficiently Handle Multi-Channel Interactions

The multi-channel customer is a modern business reality that introduces new complexity into the contact center. A coordinated, Unified Agent Desktop enables agents to handle multiple interaction channels with equal proficiency. Instead of dedicating staff to various channels, you're free to allocate staff as needed because all of their tools are presented in the same, familiar interface regardless of the channel. This enables the agents to focus on developing customer-service skills, rather than technical proficiency.

The screenshot displays the Cincom Synchrony unified agent desktop interface. Key components include:

- Contact Search and Screen Pop:** A search bar and results table showing contact information for Bronson Tucker.
- Universal Queue:** A table of activity search results with columns for Campaign, Category, Sub-Category, Name, Description, Status, and Created.
- History:** A list of past interactions, including mortgage applications, checks, and inquiries.
- Resource Panel:** A sidebar with various task options like 'New Email', 'View Fulfillment Requests', and 'Schedule a Callback'.
- Interaction Panel:** A detailed view of an email interaction from Bronson Tucker dated Tuesday, March 20, 2007, regarding mortgage rates.

An example of the Cincom Synchrony unified agent desktop displaying an e-mail interaction and customer history.

Organized Content Improves Efficiency and Accuracy

Agent environments that call for several customer management programs to be open or available at once increase the chances that even a well-trained agent will choose the wrong screen or program to address a customer inquiry.

- The desktop's chameleon-like design delivers only what the agent needs for a specific interaction or customer.
- With fingertip access to the right information at the right time, the agent is able to respond more rapidly and with greater accuracy.

Reduces Error-Prone Data Entry

The Unified Agent Desktop eliminates redundant data entry while improving data accuracy.

- Annoying customers by asking them to repeat account information and data re-keying become things of the past in a properly implemented universal desktop environment.
- Agents no longer need to recall the correct systems to enter a new customer record or service request.
- Desktops simply display the relevant fields in a logical and easy-to-understand format, and the back-end integration automatically populates new data and changes to all appropriate internal systems and databases.
- Post-call work goes down, and accuracy goes up as a result.

Taking the Time Out of Training

When agents no longer have to toggle in and out of numerous applications, they no longer have to learn the intricacies of each of the independent applications. This can save days or weeks of new agent training. (In the cable company case study presented earlier, three weeks of training were eliminated, saving a dramatic \$5 million annually.)

Simplifies Complex Environments

The desktop view can instantly adapt to the task at hand, whether that is categorized based on the user role or access clearance, or the topic of the customer interaction at hand.

- A Unified Agent Desktop can be quickly configured to support multiple departments and multiple customer campaigns simply by implementing rules that dictate how the desktop will appear to each user.
- Users are not required to change applications or even know what functionality they will need at any given time.

How It Works: Non-Intrusive Integration

The web services-based unified desktop approach recognizes that even though your current applications and back-end systems aren't integrated, they are in place for a good reason – they work. Whatever they may lack in front-end integration, at their functional core, they are the time-tested, battle-hardened programs that are tightly integrated into your everyday business. Valuable knowledge transfer can be promoted by building a common, unified front end to these valuable back-end systems – a.k.a. the unified agent desktop.

Using clearly defined web services standards, the agent desktop is built on the same key functionality that already powers your business, but delivered with an easy-to-use, ubiquitous thin-client interface. Functionality is not compromised, re-invented or even taken offline during the transition.

- It doesn't require a "rip and replace" disruptive approach; instead it offers a simple, unified front end to your proven, stable systems.
- The thin-client interface enhances the ability to expand rapidly and respond to changing needs, including new customer priorities, new business processes and new contact channels.
- Eliminates the need to customize multiple software installations when new initiatives require a change in the display and management of customer data. The business rules and functionality can be optimized independently of the "last mile" to the agent desktop, ensuring that both are tailored to best meet the needs of your enterprise.
- All interface changes are managed in a single, standards-based application and published to the entire agent community at the right time.

"The most advantageous feature of Synchrony is that it integrates all of a company's disparate databases into a single unified interface. This results in reduced training times, as a consistent interface is much easier for agents to learn."

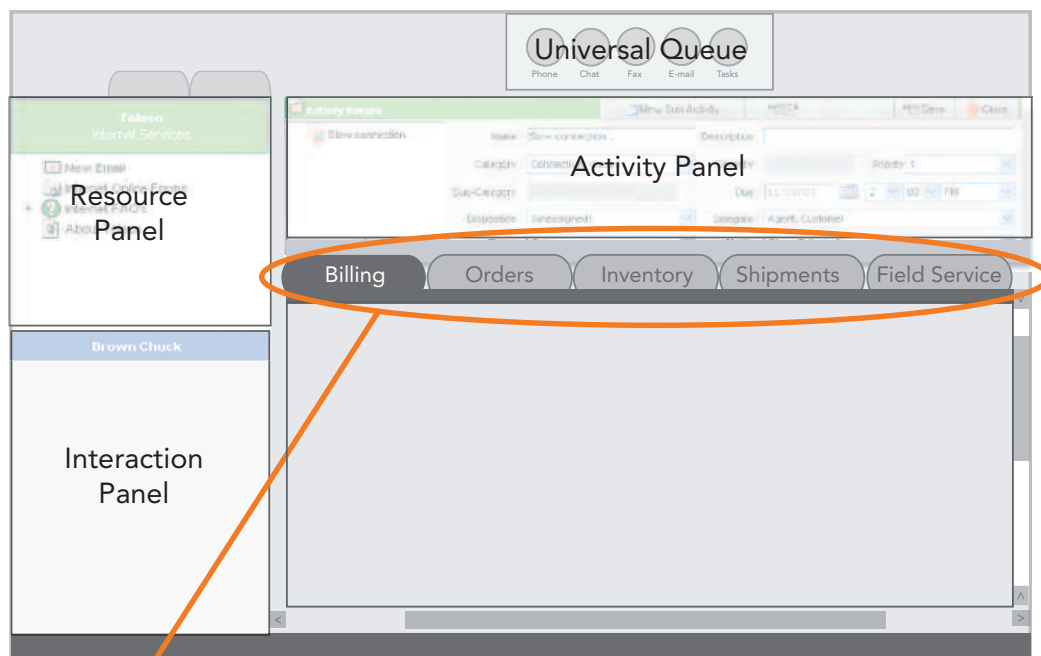
– from an independent review of Cincom Synchrony by TMC Labs

Synchrony™ Smart Tabs

Get Smart with Synchrony: Just-In-Time Knowledge and Contextual Functionality

For the customer, choice is king. For the agent however, choice can be dangerous. That's why Cincom Synchrony's Smart Tabs are a powerful component of the unified desktop; they take the guesswork out of the equation.

- Synchrony Smart Tabs present context-sensitive integrated functionality based on the current activity or query being pursued.
- Smart Tabs can be opened and pre-populated with customer information from all supporting systems presenting a clear path to the most likely action necessary to resolve the call.
- The integrated tab system provides instant efficiency gains for the contact center organization by eliminating multiple application load times, sign-ons and navigation to specific customer data. This spares both agents and customers the tedium of wading through password recall and record-retrieval delays and makes it much easier for agents to select the correct functionality.
- Tabs can be grouped by functionality and likely need, blending the capabilities of multiple applications on a single tab. Smart Tabs also reduce the ramp-up costs each agent incurs when setting up the desktop each day.



Smart Tabs increase productivity and efficiency by giving agents access into the multiple applications and systems they need to do their jobs – quickly and accurately. Based on the purpose of the interaction, the tabs change dynamically.

The Perfect Customer Experience Begins in the Contact Center

Customer expectations are increasing every day and the multi-channel customer is a modern business reality. Customers today want and expect to be able to communicate with you in whatever manner suits them that day and through whatever channel they want. They want you to recognize and anticipate their needs. But what hasn't always been reconciled is whether meeting these customer demands is just a cost of doing business – or can a return on investment and competitive advantage be realized through investments in the contact center where these expectations are often created and delivered upon?

Now the secret of many forward-thinking companies is out. They've used their contact centers to differentiate themselves through their "customer experience" and have built exceptional brand loyalty doing so. As these companies happily surprise their customers by exceeding their expectations, they've made the contact center and the agents central to the experience. They have created significant competitive advantage by utilizing technology such as the unified desktop that enables them to craft and manage their customer experience strategies.

Additionally, as an organization, they have taken on the customer-centric mindset necessary to remain competitive long-term.

To be productive and meet their performance and satisfaction targets, agents must understand the tools at their disposal. Unifying the agent experience into a single desktop takes the complexities out of the training process. By promoting a single, browser and tab-based approach that is widely understood by computer-literate professionals, enterprises can streamline the agent education process, making it easier to bring new agents online without weeks of technical training. This in turn frees up more time for value-add activities, such as cross-selling briefings and product education.

Fundamentally, people enjoy being good at their jobs, and they enjoy being provided with the means to do their jobs well. The unified desktop empowers agents with ready access to appropriate information for each caller making the challenge of a diverse customer base much more manageable and enjoyable for front-line employees. Job satisfaction is closely tied to delivering memorable and satisfying customer experiences.

Desktop Feature	Increases Value	Improves Efficiency	Improves the Experience
Screen pop	Know who's contacting you	Save seconds in lookup.	Shows efficiency and professionalism.
360° customer view	Understand the customer's status	Save minutes.	The agent knows the customer, his previous experiences and his current status. The customer appreciates the personalization and speed of service.
Non-intrusive application integration	Immediate access to the right information	Save <i>many</i> minutes.	Fast, accurate service – what every customer desires. Even the angriest customer may be appeased because the agent is knowledgeable and responsive.
Shared desktop	Escalate issues without interruption; eliminate repetition by customer	Save <i>many more</i> minutes.	The customer is connected with an expert to fully resolve the issue or take it to the next level. Plus the customer isn't exasperated from a complete disconnect within the organization.
Analytics and reporting	Track, manage and improve	Priceless	Nurturing happy customers takes continuous evaluation of the contact center. What happens at the desktop is at the root of building the business intelligence required to manage and improve your business.

The Clear Path Forward: Unified, Useable Information

Every touch in the contact center, whether inbound or outbound, represents a unique and immediate opportunity to extend and strengthen a customer relationship. Each interaction, whether it is a sale or a save situation, requires that your agents be prepared to respond quickly to the unique demands of the individual customer. Today's contact center agents need the best decision support available to make the right decisions for customer satisfaction and profit growth.

The contact center is the hub of knowledge flow, both into and out of the organization. Bringing sensible presentation and a unified view of critical business data to every agent desktop is a meaningful and critical way to rationalize the powerful yet uncoordinated applications that drive each and every customer touch, and improve client value at every opportunity.

About Cincom Synchrony

Cincom Synchrony simplifies the complexities of today's contact center to enhance the customer's experience, while simultaneously optimizing agent and operational efficiency, and driving better decision-making. By uniting multiple applications, systems and resources into an intelligent agent desktop, along with multi-channel interaction management, Synchrony provides inbound and outbound environments with a high-value, low-cost contact center solution.

For over seven years, Synchrony has been hard at work in contact centers around the world and is backed by Cincom's four decades of experience and deep domain expertise for rapid and continuous return on investment. For more information, visit www.cincom.com/synchrony.

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