

White Paper ***Quality Program for the Small Call Center***

“Call Monitoring / Recording”

(So everyone is on the phone, they look busy, but sales haven't gone up and you're not really sure what's being said or to whom.)

To effectively manage a call center, large or small, many of the issues are the same. Knowing what your agents are telling your customers is essential in managing any call center's activities today.

In attempting to measure an agent's activity, whether it's for Compliance, Performance or Risk management (CPR), many factors come into play. The solutions available to the larger call centers aren't always within reach of the smaller call center, or in some cases, even appropriate.

So where do you start if you've got the average small center with less than 100 agents and you need to measure the level of performance of each agent and/or you'd like to have a record of their conversation?

One of the most straightforward, simple and cost effective ways to begin a quality program is by implementing a manual “live call monitoring” process. With the implementation of a “live call monitoring” process you have the ability to selectively dial access each agent and listen to how they handle the customer.

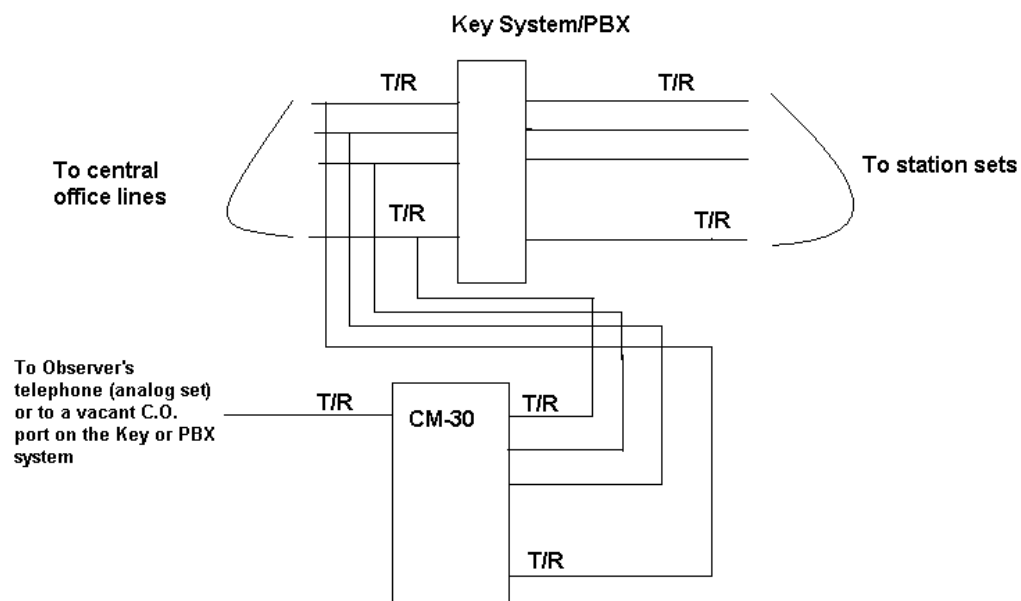
Through the use of such a “live call monitoring” system your supervisors are immediately in touch with what is being said by the agents to the customers and their reactions. Immediate feedback is important not only from a management standpoint, but this feedback can also be used to reinforce the agent's performance through quick feedback to them. They need to know what they're doing well and where they need improvement. Consequently, if “live call monitoring” was all you implemented, you would immediately have access to information that would help you better manage the company's business.

Dees offers a complete family of products that provide “live call monitoring”. The CM-10 is a 10 line non-expandable system, the CM-30 is a 30 line unit expandable up to 90 lines through the use of the CMX-300 our 30 line Expansion Unit.

The CM family offers features widely used by supervisors such as; dial selective silent monitoring, talk-assist and beep-tone. It's important not to have any unnecessary clicks, bops or voice degradation when actually doing the monitoring, and the CM family can assure you of that. The "talk-assist and beep-tone" are strapable options within the CM-10 and CM-30 units. Accessing the CM system can be done from a dedicated analog (2500) set or through the communication system in use, if one is being used.

Lets say you've decided that you do want to implement "live call monitoring" within your call center. The next question and decision that needs to be addressed is what type of communication system is being used in the call center, or do they even have a communication system. Maybe all of the agents are connected to dedicated outside lines.

The CM family of call monitoring products need to monitor analog voice. If you're connected to outside telephone lines, no problem, they most likely are analog lines. Only in a rare instance would you have digital T1 lines coming into a small call center. And even it the lines were T1's you could still use the CM products and make the connections to each of the agent's individual lines after the demux unit of the T1.



In this configuration the CM-30 is connected to monitor the Central Office lines coming into the system.

Fig. 1

If however, the incoming lines are analog, then the connections would be across each outside line identified with each agent.

If, on the other hand, you do have a communication system serving the call center, then you must determine if the agents are on analog ports or digital ports from the system. If the agents are on analog ports, it's a simple matter of connecting to each agent's line to the input of the CM product. If they are on digital ports, then the type of system comes into focus. You will need an "analog converter or D/A converter" between the station lines and the inputs to the CM product. This need not be a big issue because Dees has an analog converter for Nortel's key system (Norstar) and their PBX's. It's our MRI-320 four port unit.

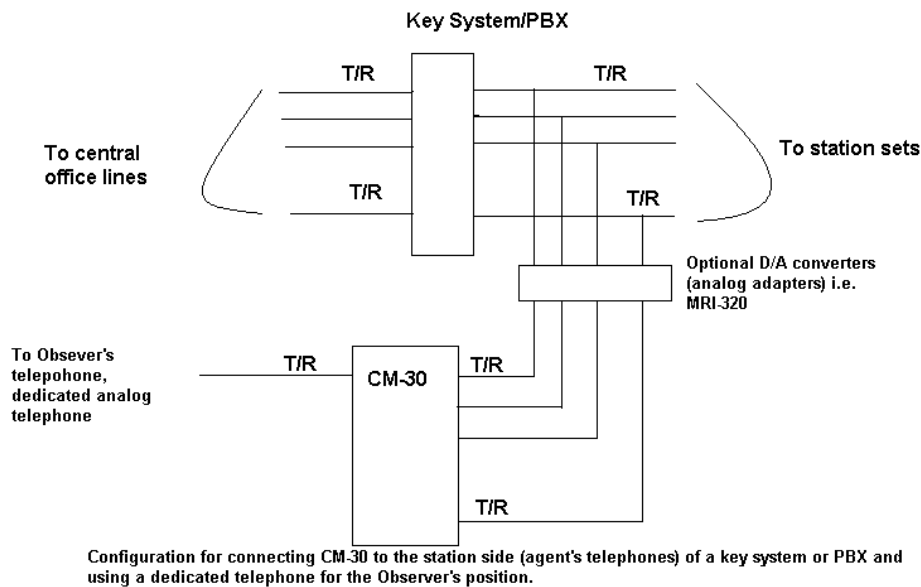


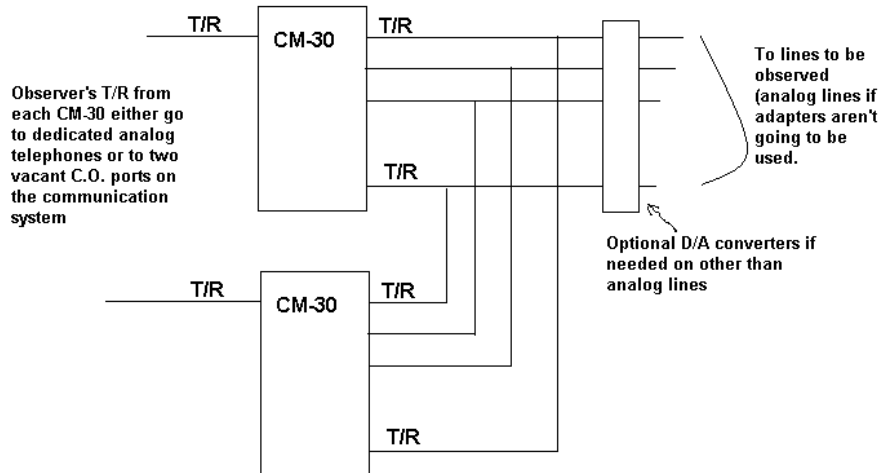
Fig. 2

If however, they have a system other than the Nortel, in most cases the manufacturer of such system will have the necessary analog converters available.

Access to the CM system is either via a dedicated (2500) set or through one of the proprietary phones from the communication system in use. The most popular way of accessing the CM system is by connecting the observer's port of the CM system to a vacant central office line port of the communication system in use. By using this connection, the supervisor can use the same telephone instrument they use for inbound and outbound calls to also access the call monitoring system (CM). Using this method of connection for accessing the CM system, the CM system would show up under the dedicated outside line key (to which the CM system was connected) on their telephone.

The CM systems are single link systems, meaning that only one agent can be monitored at any given time. In those instances where there is a requirement for more than one agent to be monitored at the same time by different supervisors,

multiple CM systems can be paralleled. Up to four individual CM systems can be paralleled together to provide simultaneous monitoring.



In this configuration two CM-30's are connected in parallel allowing two observers to be monitoring different lines/agents at the same time.

Fig. 3

With the system installed, normal operation would be as follows; the supervisor would come off-hook on the CM system with a standard tone-dialing telephone or cordless phone (no dial-tone is given by the CM system), and dial a two-digit number from 10 to 99. A listing of the line assignments must be made in order to know what agent is being monitored when a given number is dialed.

Upon completion of dialing the last digit in the two-digit number, the supervisor will be connected across the agent's line in the observing mode. Nothing will be heard by the agent or the distant party, no clicks, pops, background noise, nor will there be a reduction in volume on the call. The supervisor can move from agent to agent without having to go back on-hook, by simply dialing the (#) key then another two-digit number. The (#) key releases the current line being observed.

"Talk-assist" and "beep-tone" are two strappable options that are only available when the CM system is used to monitor analog lines.

"Talk-assist", allows the supervisor to break into a conversation by dialing (*) key while the call is being monitored. After dialing the (*) key the supervisor will be heard by both sides of the conversation being monitored.

The other option available is the “beep-tone”. If this option strap has been installed, then upon accessing the agent’s line, both sides of the conversation would hear a short momentary beep tone.

The CM family of call monitoring systems consists of the CM-10, which is a 10 line, non-expandable unit, CM-30, which is a 30 line, expandable up to 90 lines unit and the CMX-300, which is a 30 expansion unit for the CM-30. Each CMX-300 adds an additional 30 lines to an existing CM-30. The maximum number of CMX-300’s, which can be connected to the CM-30 is two.

Once the call monitoring system is installed and operational, you then have the means to listen in on all calls being made by the agents. Even though this offers a significant step over not having such a system, the next step in this process of monitoring quality in the call center, to have a record of what’s being said.

Unless the need is to have a record of each and every call made by all agents, which will be covered later in this document, the recording of individual agent’s calls while they’re being monitored is quite easily accomplished. To facilitate the need to record the call being monitored, two systems are offered, the Xtension Recorder specifically for Nortel systems (PBX’s and Key Systems) and the Phone 2PC for all other digital and analog systems.

There are White Papers available on both the Xtension Recorder and Phone 2PC, so we won’t go into detail on their operations in this document, but rather just explain how they can be used in conjunction with call monitoring.

The recording needs within a call center vary from center to center, whether it’s for compliance, performance or risk management, your first task is to get the voice data in a format which is flexible and readily available.

Whether your CM system is connected behind a communications system or directly to outside central office lines, as long as you have a PC associated with the supervisor’s/monitor’s telephone you can implement either of the call recording solutions mentioned above.

With either the Phone 2PC or Xtension Recorder implemented, recording the conversation which you are monitoring is as simple as beginning to talk or clicking on an icon on your Windows desktop. The recording systems can be setup for manual starting and stopping of the recording or setup so they will automatically start and stop upon the detection and absence of voice. Either way, you are assured of a complete recording of the conversation being monitored.

Recorded conversations are the basis for the beginning of a more qualitative assessment of your agent’s performance. The recordings are now readily available to you for emailing, listening/reviewing, sharing with the agents as well as making a more in depth analysis of what’s being said by the agents. Once

you have the conversation recorded, you literally have a verbal picture of the interaction between the agent and the client.

With the ability to review calls off-line, more time can be taken to really listen to and understand exactly what took place during the transaction. The ability to review this data in an off-line fashion yields the type of information necessary to operate a successful call center business today.

Quick assessment of your customer's reaction to a transaction is important in maintaining the all important customer vendor relationship. Plus, the agent's overall performance will be improved if they are aware of their need for improvement, and that's where quick feedback to the agent is important. The ability to remotely access your agents for monitoring and or recording purposes is a growing trend within call centers and has proven very beneficial. With the implementation of the DeesLink, remote access unit, an observer can literally be anywhere on any phone and dial access a specific agent. Consequently, a supervisor can do a quality analysis while working from home.

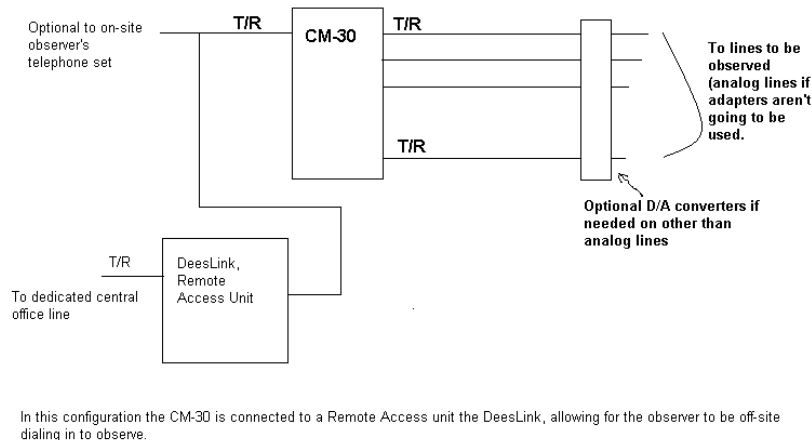


Fig. 4

The idea of remotely accessing individual agents opens up many possibilities. More often than not today, client companies that contract with call centers, require that they provide a means of remotely accessing particular agents that are working on their behalf. The DeesLink provides that connectivity plus allowing for password protection and restricted dialing privileges. You can request a White Paper on the Deeslink directly from Dees, which explains in detail the operation and functions of the product.

Obviously quality programs can be taken far beyond what this paper describes in sophistication and automation. However, in most small call centers where there may not always be an ACD or CTI server, options can be limited as to the level of

sophistication and automation available. But that doesn't mean that there are no options. When the circumstances warrant more sophistication, such as automated scheduling of recordings per agents contact Dees can provide you with a solution. Contact us and we'd be happy to discuss an appropriate solution for your application requirements.