



Building an Incoming Call Handling Strategy

White Paper

Abstract

Incoming calls can be critical to a business. At best, a poorly managed incoming call strategy will create a poor impression of the business and create customer frustration and impatience. At worst, missed or delayed calls from potential customers or key partner contacts can mean direct loss of revenue. This paper looks at how intelligent communications applications enable the development of business incoming call handling strategies to ensure calls are handled appropriately.

Incoming Call Handling Strategy

In an increasingly global and competitive business environment, companies today need to seize every opportunity for competitive advantage. Yet, today, few companies have in place an incoming call strategy for their business and, in those that do, the call strategy is often restricted to within the Call Centre environment.

Incoming calls can be critical to a business. At best, a poorly managed incoming call strategy will create a poor impression of the business and create customer frustration and impatience. At worst, missed or delayed calls from potential customers or key partner contacts can mean direct loss of revenue.

Intelligent communications applications enable the development of business incoming call handling strategies to ensure calls are handled appropriately.

Not all calls are of the same value to a business and TeleWare's intelligent approach to telephony enables a business to differentiate between call types and provide the most appropriate handling.

Incoming calls cover a wide range of complexity and urgency and the skill levels required to handle the calls will vary, depending on the call type. The range spans from routine internal and external calls, which require little knowledge or skill to handle, to high volume, low value external calls, where a relatively narrow knowledge set is required, to low volume, high value calls, which require a high knowledge or skill set to handle. If a business handles all calls in the same way, taking a middle ground, the costs of managing low value calls will be higher than necessary and not enough importance and priority will be given to the important and business critical calls, requiring more specialist skills.

The right call handling strategy directly affects customer satisfaction. It will also increase staff productivity and reduce telephony costs. Systems can be introduced on a pilot basis and expanded progressively across an organisation as appropriate.

A strategy should bring about improvement to communication across the breadth of an organisation, and provide simplicity of contact for individuals and teams, irrespective of their location, preferred device and the underlying technologies deployed within the infrastructure of their organisation.

The Question of Call Routing

Call handling is analogous with handling access to a company website. Take any company's homepage on their website. The webmaster's aim is to provide a memorable single identity for ease of access to the company. A well designed website allows the surfer to easily navigate from its homepage to find the specific information they require. Once someone knows the location of regularly sought information, they can enter the page address as one of their Favourites or Bookmarks so as to get to that location directly. The visual presentation of the web gets over an age old problem within telephony – how to enable callers to get to the required resource simply and easily.

The aim of a call handling strategy is to offer this same simplicity and ease of access to the caller. A tried and tested method has been the use of an easily remembered 'Golden Number' – often a Freephone number. This is marketed by the organisation as their primary point of contact and, in time, becomes well enough known to the general public for it to be used, particularly for first-time callers. This approach provides a simple, generalised, access into the organisation, rather like a home page on the web.

Beyond that, different organisations will employ different strategies to enable callers to reach the department or specific staff member required to handle their call. Unlike the situation with a well structured website, there is no ideal way for telephone callers to navigate their way to the resource they require unless they know a specific direct telephone number or use some form of automated directory system.

The organisation needs to balance the attraction of a Golden Number and its marketing practicalities against the logistics of publicising numerous individual function, department and personal numbers.

The Numbers Game

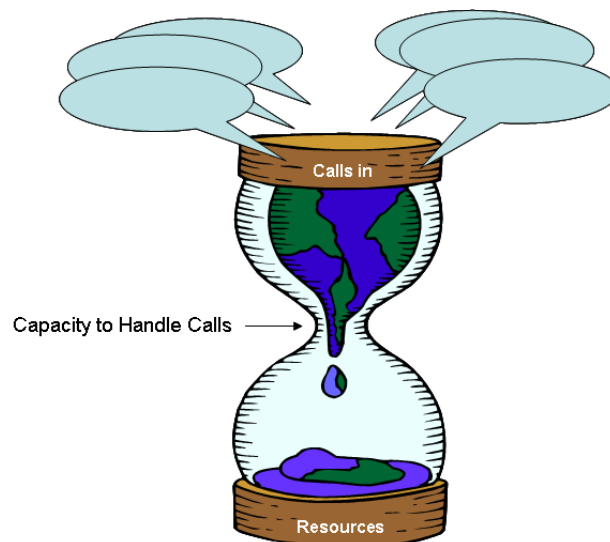
Numerous surveys have been conducted in Europe and in the United States regarding the success rates of contacting people within an organisation. The record shows that about 20% of calls reach their intended destination and, therefore, result in a live conversation between two consulting adults. (The figure published most often has been 19%). The abandoned call rate varies but is consistently in the region of 13% of calls.

As the workforce has become more mobile and with the uptake of flexible working practices (such as home-working and tele-working) increasing by popular demand, these contactability figures have worsened over recent years.

Voice mail has, on many occasions, been implemented to prevent excessive 'ring no reply' situations and to give a base level of store and forward messaging to assist communication. But voice mail is a solution that addresses the symptom, not the problem - the problem being how to access the right person in a timely manner at a minimum cost to the organisation.

The Hour Glass Model

You can consider incoming voice communications to an organisation as shaped like an hour glass. Calls come in from anywhere, worldwide, through some form of routing and are passed out to resources of all kinds within the organisation. The pinch point is critical as all the sands of communication pass through it. Availability and flexibility are key to keeping this pinch point as open and quickly passed through as possible. It is at this point that a business can take decisions on all the calls and choose to route them in line with the appropriate business rules and priorities and, therefore, improve effectiveness and reduce costs.



The cost of outgoing calls is obvious and visible on the monthly bill. With outgoing calls, we can optimise and control call costs by least cost routing and by buying corporate call minutes carefully. But every incoming call also has a cost to the organisation – one that is much more difficult to calculate – and the sting in the tail is that incoming calls are, in many cases, transient assets to the organisation. Treat them wrong and they can be lost for good. Treat all calls the same and priorities can be missed, resources misaligned and costs wasted.

So a variety of techniques are needed to measure the impact and to effectively route and handle these incoming calls. Techniques such as:

Automated Response / Information Services

These include facilities such as data capture and enquiry, fax back services, voice forms. Methods of ensuring the incoming callers are able to deliver their message and get a response as quickly as possible. The advent of the current Speech Recognition (ASR) and Text-to-Speech (TTS) capabilities has greatly improved the general acceptability of these services.

Auto-Attendant and IVR Services

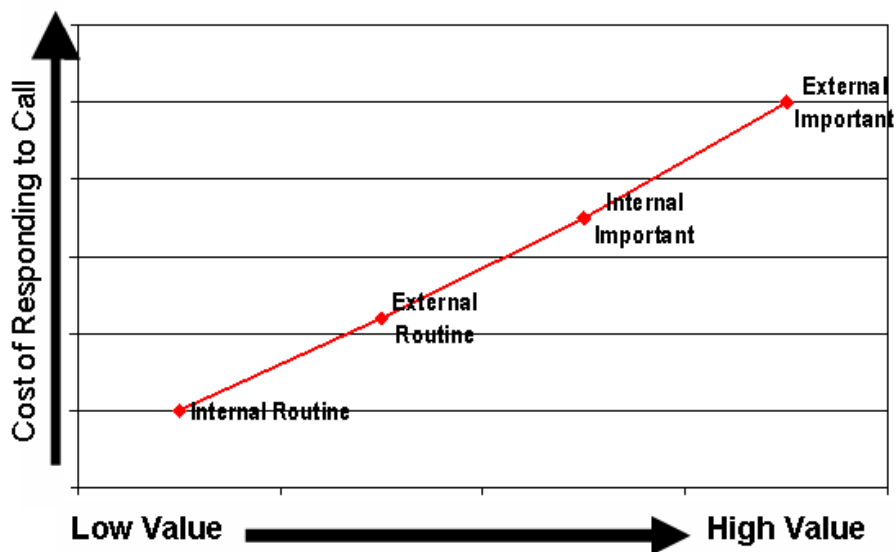
Deliberately separated from the above as these are routing services rather than methods of handling the caller's requirements. Again, these services can be greatly improved with the deployment of ASR and TTS. Loved or hated by callers, these services need careful deployment to be usable, acceptable and effective. Auto-attendant / IVR services can add valuable routing services to front-end the call centre – either to add pre-processing to a single or multiple call centres, or to supplement the capabilities of a more modest Automatic Call Distribution (ACD) system. Call centre agents normally have a broad range of knowledge but, by definition, the depth of the knowledge is limited and, generally, there are process rules applied.

Teaming of Skills and Capabilities

A very effective mechanism for incoming call handling is the teaming of smaller work groups. Such teams are often deployed over a wide area and require mobility or geographic independence. Groups are often more specialist in their area of knowledge and the depth of the knowledge required to handle calls is, typically, deeper.

Specialists and Alternatives

Finally, there are those calls that need to be routed to individuals. Such individuals may possess specialist skills. Individuals will, more often, have narrow areas of expertise, but be hugely knowledgeable on their subject. Individuals may have alternatives in their specialist team that are work colleagues who can also effectively manage the requirements of the caller. The organisation not only needs to get important calls to them, wherever they may be, but also needs to back off to other resources any calls that can be handled more cost effectively by an alternative process.



The ability to offer integration of services provides many tangible benefits to the workforce across the organisation.

Back to the Hour Glass

How convenient that the call Hour Glass works to facilitate the creation of an effective incoming call strategy! The Hour Glass model brings all calls through the pinch point and where better to selectively record specific calls incoming to certain individuals, or certain teams, irrespective of their location or device. Call recording is particularly appropriate (and sometimes essential) for certain vertical markets, such as legal, health, education, utilities and finance.

Location Independence

Finally, let us consider what location independence really means and why it has an impact on effectively handling incoming calls. The principle of location independence is any device, on any network – fixed or mobile – anywhere worldwide. Not just on-net!! This enables part-time workers, home workers and flexible workers to effectively handle calls for themselves or their colleagues and be part of the company's incoming call handling strategy.

Although most commonly used to describe the contact number for an individual person, the concept of a Personal Number, or to more aptly describe it, an Intelligent Number, can be extended to include a number that describes a function or a job title, a rank or a location.

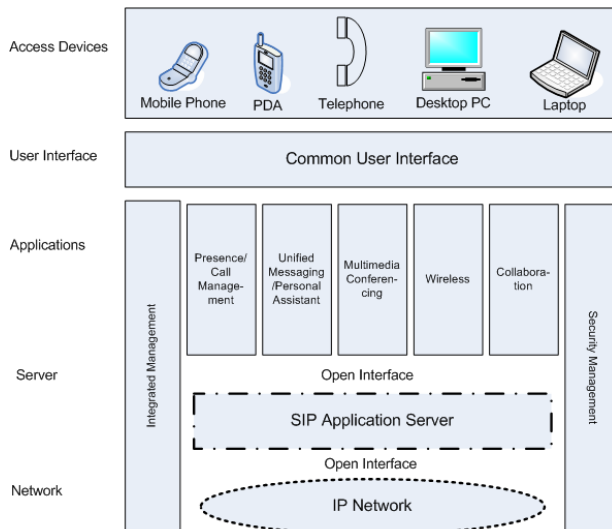
A Police incident could be allocated its own number. Investigating Officers register available during their shift to the Incident Number as part of a team – on any device, anywhere. An Intelligent Number can be allocated to a product for 24 hour support cover. The people on shift simply register to that number while on duty – manually or by means of a schedule. Their use can also prevent the need for personal home or mobile numbers to be published where this information is sensitive.

A consultancy or accountancy company could use intelligent numbering to ensure that calls are passed to the specific person responsible for that specialist area wherever they are in the world. For instance, a caller looking for a company in a specific sector for bankruptcies would be able to be routed to a bankruptcy expert first time. This system has been demonstrated to increase the probability of an appropriate person answering the call from 1:5 to 3:5 providing better customer service, reducing dependency on voice mail and reducing return call bills.

Use of intelligent numbers in the business can ensure incoming calls are pulled to the appropriate person or department where they can be handled more efficiently and cost effectively. Intelligent numbering used intelligently is a critical part of a cost saving incoming call strategy.

Unify the Lot

The ability to bring together all fixed and mobile messaging services, including voice mail, fax mail and, where appropriate, video mail, gives great benefit to users. For simplicity of use, nothing competes with a single number (intelligent Number) and a single inbox, in which the user receives all the above but integrated into their e-mail application interface - a solution delivering a single messaging portal. This messaging capability could be provided by the desktop vendor (IBM/Lotus or Microsoft) or the PBX vendor (Nortel, Siemens, Cisco). Full integration of



the intelligent number into the unified communications architecture is possible, ensuring calls are notified via SMS and/or email as required. Again, TTS capabilities ensure that all message types can be retrieved through any device – phone, fax, email or SMS.

Flexibility and Ease of Management

One certainty in business is that things will change, so it is vital to design into any incoming call strategy some flexibility to accept changing requirements. The way in which certain call types are handled must remain flexible, and changes must be simple to implement via a secure web interface from wherever convenient. For efficiency, there should be a single database for all users and a single interface through which to manage all aspects of the functionality.

Management reports are necessary to monitor the performance of key customer-facing areas in real time, measuring performance against targets. A macro level view of departmental performance needs to be supplemented by micro views of individual performance in terms of call handling. This is particularly relevant where individuals and teams are working independent of location and may be using any number of work locations.

Example Incoming Call Handling Strategy

Many organisations, outside the Call Centre, are “running blind”. What is happening to calls to departments and individuals, especially those who are mobile or work from a number of locations? What quality of service is being given to callers? A call handling strategy with a number of clear guidelines can be put in place and the users can be monitored in order to ascertain performance against the targets set.

For example, in my strategy I could set out the following:

- No call shall ring for more than 18 seconds before a response is given.
- No phone shall ring unnecessarily causing disturbance to others.
- An attempt shall be made to contact an alternative person for all external calls received prior to placing the call to Voice Mail.
- At least 50% of external callers shall be answered by the called party or a suitable alternative.
- Voice Mail shall always offer a breakout option.
- All customer-facing staff shall update their Voice Mail greeting at least daily.
- On receipt of a Voice Mail, the recipient shall be notified by an appropriate method, dependant on their location – Message Wait Indicator, SMS, email notify or outcall.
- IVR menus shall be no more that 3 wide and 2 deep and shall use TTS for consistency and ease of update.
- Statistics shall provide information on call volumes and results for individuals, teams and IVR call flows.

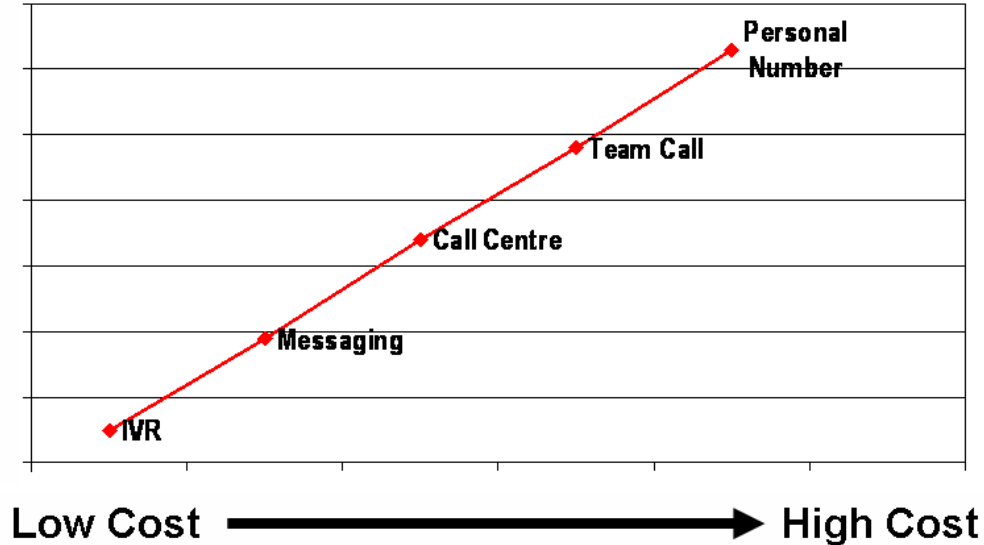
Then, tactically, call routing is put in place to optimise call handling:

Routine requests for information or notification of information can be handled by an Auto response / information system which provides information (such as opening times) or offers Faxback or Voice Forms to capture a standard set of information.

High volume calls may be appropriate to a call centre environment or ACD system via a system to manage call routing, announcements and queue management.

For higher value calls that must be answered by an individual, Personal Numbers increase the probability of calls being routed to the right person or a suitable alternative. A Personal Number gives individuals the ability to receive their calls on any device they nominate – anywhere.

Where there are teams with the required knowledge set, intelligent teaming can be deployed which dramatically increases the probability of a call being answered by the right person or a suitable alternative in the first instance.



An organisation does not need to move to a manufacturer's bespoke platform or be forced to replace existing infrastructure with a completely new IP Telephony environment in order to be able to deploy voice applications to build a call handling strategy. Organisations really wish to sweat their assets and build upon what they have, and not be forced down a proprietary path. Intelligent telephony applications can provide a call handling strategy on existing telephony switching hardware as well as on a converged voice/data network.

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