Success with Remote Agents – Is Not so Remote

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Introduction

iPhones, BlackBerrys, Facebook, Twitter, and other media channels — they’ve not just changed how we communicate, but also our expectations for customer service and support, as they have made businesses ultimately accessible. As a result, consumers now expect to get the information they want, when they want it, regardless of time of day, day of week, or how they’re connecting with a company, forcing companies to be flexible and innovative, finding new ways to provide optimal 24x7 customer service while still keeping costs down. One way of accomplishing this is through the use of remote agents — contact center agents that work remotely from their home or in a branch office or other remote location.

Technology has evolved to enable any company, of any size, anywhere, to utilize remote agents — with as little as a high-speed Internet connection, a computer, a phone, and a quiet environment. There are many ways to offer remote agent capabilities, but the most effective is a centralized all-in-one IP communications system that can be implemented on-premise or through a hosted offering (also known as Communications as a Service, or CaaS). These systems make it easy for IT staff to provide agents with access to the technology capabilities they need, regardless of location. Whether it’s a phone call, an email, a fax, a web chat, or a social media inquiry, all customer interactions can be handled by agents located in a pre-qualified location — typically a main office, remote office or home office.

Virtual All-in-One IP Communications

Source: Interactive Intelligence, 2010
These all-in-one IP communications systems also provide tools for supervisors and managers to effectively manage remote agents — just as if they were in the office — and mechanisms for customers, agents, supervisors and subject matter experts to communicate seamlessly across multiple channels.

This paper provides new insights to help you weigh the option of using remote agents, discusses best practices, and takes a look at new agent capabilities that are impacting the remote agent model. In addition, it includes detailed case studies of companies that have successfully deployed remote agents.

**Will Using Remote Agents Benefit Your Business?**

The use of remote agents is not for everyone, but it’s well worth investigating their use to augment a contact center. However, as one Director of Technology advised, “Don’t deploy remote agents for remote sake — there has to be a strong business driver. If you don’t have a problem that remote agents will solve, don’t do it.”

Some of the more striking benefits include:

- **Increased agent talent pool** – By using remote agents, organizations can take advantage of a variety of workers that may not be able to work full-time in a formal contact center. Remote agent deployments can include work-at-home (WAH) parents, students, disabled workers, retirees, and others. For example, Veterans2Work specializes in matching veterans with companies and opportunities designed to allow them to work from home, providing customer or technical support services. Organizations can recruit and attract talent globally as well, including people living in small towns or remote locations. This allows access to people with hard-to-find skillsets that are not able to commute to the company’s facility. Many potential workers cannot afford the time and expense to travel to a contact center facility and working remotely lets them be productive from home.

- **Reduced churn** – Agent attrition is something every contact center is concerned with. Running at approximately 10% per month in North America, internationally the issue is much more serious. According to Dr. Catriona Wallace, Managing Director at analyst organization callcentres.net, Australia has seen agent turnover of 49%, and India has experienced roughly 60-70% attrition. According to Rod Jones, Contact Center Industry Specialist at Contact Centre Strategic Solutions, the average tenure of agents in South Africa is 14-21 months. Adding remote agents has provided an answer to this challenge, enabling companies to better retain educated and motivated workers. Contact center managers have reported that agents who work at home are generally more satisfied with their jobs and appreciate the flexibility of being able to work remotely, in work shifts that fit in with other responsibilities. For example, the deployment of remote agents has reduced the attrition rate at one company from 25% to 5%.
• **Better results** – Catriona’s research shows that agents are often more productive working remotely than in a formal contact center environment, noting that Salmat, an Australian-based outsourcer of multichannel customer communication, experienced a significant increase in agent engagement and productivity after moving over 400 of its agent workforce to the home — many living in regional Australia.

• **Cost savings** – By using remote and at-home workers, companies can avoid building new contact center facilities, and can even rent out space in their buildings that would have been used for contact center agents. For example, one company we spoke with now sublets part of its office space, helping to cut costs, and has seen large cost savings in the area of new hire training as attrition rates improved dramatically.

• **Flexibility and ability to meet peaks and ebbs in demand** – By having the option of bringing remote or home-based workers online quickly, companies can better respond to changing demand on a daily or seasonal basis, or in an emergency, and manage peaks and valleys in call loads, without hiring for peak hours.

• **Business continuity** – Employing remote agents allows companies to be nimble and responsive in keeping the business going in the face of a natural disaster, or other crisis. When a crisis does occur, calls can be quickly routed to agents that are available remotely.

• **Going green** – At-home workers avoid commuting, thus reducing their carbon footprint. This saves money for the worker, while helping the environment. Companies avoid having to expand facilities as their contact center operations grow, avoiding the added energy burden of a larger contact center.

• **Follow-the-sun support** – Deploying remote agents in various parts of the world and in different time zones can help support an organization’s follow-the-sun strategy, providing customer service and support regardless of time-of-day or day-of-week. Many workers are willing to work from home at night and on weekends, so coverage can be expanded without even leaving the time zone.

• **Think globally, act locally** – Global companies that want to have local agents interact with customers, but cannot afford to build or staff contact centers in each region where they operate, can use remote agents to serve an international customer base without having to make a huge or unnecessary investment.

### Going Remote is Not without Challenges

Employing remote agents has both real and perceived challenges. The following are the three greatest perceptive barriers for uptake:

• **Perceived loss of control** – Many senior executives don’t feel agents can be trusted to work at home without constant in-person supervision. Are at-home and at office environments really that different? Sally Hurley, President of VIPdesk, explains, “Most managers in centralized contact centers don’t physically look around the room to see who is on the phone, they use software to determine agent usage and performance. The same is true for a virtual operation. We rely on technology dashboards to monitor schedule adherence,
utilization and overall performance. As such, we are using the same management tools.” To overcome the control issue, some companies require agents to work a shift in the office once a month so they can have face time with their supervisors.

- **Perceived security compromise** – Many senior executives quiver at the idea of allowing remote agents to access sensitive data remotely. The reality is that whether or not an agent is in the office has little to do with their propensity to handle customer information inappropriately or fail to follow proper security procedures. Customers that adopt the remote agent model typically lock down a designated computer for company use only and/or provide a thin terminal client, in addition to taking necessary network security precautions to ensure secure, encrypted communication. This is one of those issues few want to argue with and assume the risk for, but most know has been addressed for years.

- **Lack of awareness of adoption** – Surprisingly, much of the market is unaware of the progress that has been made with remote agents. We strongly recommend getting senior executives in front of real customers solving real problems. An “aha!” moment will likely follow.

Negative perceptions are often difficult to overcome, but the hard work with executives is mostly up-front. Catriona Wallace notes that once senior executives “get it,” a mandate to rapidly deploy the model across a significant portion of the agent pool generally follows. She noted that after initial use of remote agents, Westpac Bank in Australia mandated that 15-20% of the agent workforce work from home in the next 12 months.

Once approval to move forward with the remote agent model is received, there are other challenges that may need addressing, including:

- **Initial set-up and adjustment** – Jim Borum, Senior Vice President at RDI Marketing Services, shares, “Coordinating the initial set-up and getting agents adjusted can be a challenge. This includes making sure the agent’s home connection works, they adjust to their new work environment, and family members are trained on how to behave while work is in progress at home.”

- **Agent isolation** – One of the greatest challenges is that agents working remotely can often feel isolated. In fact, some have chosen to come back into the contact center because working at home just doesn’t suit them. Adjusting to this new environment can be a particular challenge for an older, more mature workforce. Sally Hurley at VIPdesk notes, “Due to the distributed nature of our employees, team members don’t often meet face-to-face.” To combat this, VIPdesk uses social media tools, such as chat rooms — both social (for “water cooler” discussions) and campaign specific — to keep agents engaged and connected. In the absence of face-to-face interaction,
VIPdesk also holds regular “town hall” webcasts, and regular scheduled team meetings via conference call. In addition, chat rooms and instant messenger tools have features that allow VIPdesk agents to see their colleagues’ photos and presence status, helping to keep them connected. RDI also uses chat extensively to help remote agents feel connected and to enable them to reach back into the contact center to access knowledge experts.

- **Training** – Remote agents don’t have the benefit of sitting in a classroom unless they come into the main facility, but with the proper use of online and virtual training, this can be a non-issue. VIPdesk, for example, provides 100% instructor-led training in small virtual classrooms of no larger than 12-15 students, along with requisite online training and reading material, online assessments, and chat rooms to discuss training issues. Some companies prefer to have the agents trained in their facility prior to beginning work remotely. Which approach to take — online, virtual, in-person or a mix — really depends on the business, and agent type.

- **Sorting through the applicants** – Ironically, companies that move to a work-at-home model often find themselves with a problem they really didn’t anticipate — how to manage all of the requests for employment. This is a good problem to have.

Outside of North America, there are other unique challenges, including:

- **Broadband Access** – Some Asian countries such as China, India, and Malaysia contend with reliability issues and availability of the communications infrastructure and broadband access, limiting the locations remote agents can work from. This has been a major issue in South Africa as well. However, progress is being made that will soon remove this barrier in many international locales. Rod Jones explains, “We are very excited about mammoth rollouts of bandwidth in South Africa. Local deployment and availability of bandwidth is growing daily.”

- **Government, political and union issues** – There are still significant government and political issues to overcome to increase adoption, especially in Asia. Unions can be extremely powerful and are not always supportive of the work-at-home model. The resistance is ironic given the opportunity to enhance the economy during difficult times.

- **Theft and violence** – There are certain regions that just aren’t safe to have remote agents deployed. Crime can be a serious inhibitor as having expensive equipment in such areas could present a risk to the company and, more importantly, the agent. Rod Jones shared that there is also a major copper theft problem in some areas of South Africa – a phenomenon that has been on the rise across the globe during the economic downturn.
Overall, however, those who have deployed remote agents successfully have found that the benefits far outweigh the challenges. With that said, let’s take a look at a few best practices for deploying remote agents.

**Remote Agent Best Practices**

As with any new implementation, there are best practices that organizations should follow when deploying remote agents, keeping the focus on technology, people, and process. An important part of the process is to remain flexible. Whether your goal is to take advantage of a larger labor pool, or to save costs, remember that working remotely may not be for everyone, while for some it is considered an attractive benefit. With that in mind, here are some best practices for utilizing remote agents.

**Technology Best Practices**

Remote agent capabilities should be inherent in a contact center platform, rather than as an add-on. In fact, if warranted, the physical location of the agent doesn’t have to be constrained to the home, as long as proper rules (such as quiet environment) are adhered to. A centralized all-in-one IP communications system can satisfy this need and be implemented on-premise or through a hosted (CaaS) offering. It is important to have the flexibility to migrate between on-premise and hosted environments to address changing business conditions. For example, in the event of hard financial times or natural disaster, being able to switch to a hosted solution to cut costs or overcome location challenges can be of real benefit.

Workforce optimization software — quality monitoring, workforce management, performance management and analytics — becomes even more critical in a remote agent operation. Thus, it’s important to make sure your contact center platform is equipped to support these capabilities. Most companies are already heading in this direction as they look to virtualize contact center operations, some on a global basis.

Where appropriate, combine a traditional contact center with work-at-home agents and automated self-service systems. Calls and interactions can be handled from the main contact center during regular business hours, supplemented by self-service systems (IVR) and remote workers for nights and weekends. Also, be sure to set-up pre-built scripts that can be invoked quickly to enable agents to take calls at home when disaster strikes.

Remote agent access and endpoints should be flexible to meet the needs of the business and agent, providing access to all the same applications and tools onsite agents use. Secure access should be anywhere/anytime through a web client and endpoint of choice (home phone, cell phone, remote office phone, etc.) or mirror an office environment through a broadband connection, VPN and SIP endpoint (IP phone or softphone). Terminal server access utilities provided by companies such as Citrix can be used to provide secure access, as well as simplify deployment for IT.

Looking ahead, remote agents should be capable of leveraging full unified communications (UC) feature sets supported by their organizations in support of a broader UC strategy. For example, agents should be able to conference in, and even collaborate and share documents on the web with supervisors or subject matter
experts. Additionally, the chat function of UC can be leveraged to enable interaction with supervisors or other agents on a customer issue without interrupting the call. The growing use of UC in the contact center is also illustrated with the use of expert agents.

As with any business and technology decision, return on investment (ROI) is crucial. Identify the costs with the technology that is needed, and determine the ROI of using remote agents. This includes identifying the costs your company will absorb, versus what the remote agent is responsible for. Some companies provide the computer, telephone or end-point device, high-speed Internet access, and other things, while others expect the agent to provide them.

**People Best Practices**

In order to carefully select the right agents that can work independently, are reliable and self-disciplined, and will treat customer information confidentially, competency-based staff screening and assessments are necessary, in addition to extensive background testing. Screen workers for the skills and capabilities needed, as well as their personality. Gregarious, social people may not be the ideal candidates, if part of their make-up is being near co-workers, for example.

Next, establish a probationary trial period in order to determine whether each new-hire is a fit for working remotely. Determine performance metrics to measure the success of your remote agents. Metrics may include customer satisfaction, speed of answer, dropped calls, quality scores, productivity scores, and agent retention or turnover. Be sure to communicate expectations clearly and make appropriate performance data available to agents so they can self-manage to expectations.

Be flexible. Allow for a breaking-in period, and if working at home doesn’t work out for the employee, they should be able to return to the contact center facility without loss of status. Have clear guidelines for agents as to what is expected of them, including having a separate work area dedicated solely to their job in a quiet environment — no barking dogs or crying babies — no interruptions from family members, etc. Some companies have their remote agents sign a work agreement up-front, with zero tolerance policy for noise and unprofessional behavior. A common best practice is to treat the ability to work at home as a privilege or a reward, rather than a right, based on satisfactory performance, and to schedule remote workers based on their performance, so that the plum weekday daytime hours go to the best performers.

Training can make or break a remote agent strategy. Depending on the complexity and sophistication of the issues and types of interactions agents will handle, companies may require initial agent training to take place in the company’s contact center or main facility, with follow-up training taking place online. Regardless of which route you take for the initial training, it’s important to provide ongoing online training for agents, allowing them to access training sessions at their convenience. E-learning and web-based training makes it easier for remote agents to be trained, and workforce optimization products and services make it easy for remote agents’ performance to be monitored remotely, while having the same recording, reporting and analytics capabilities as in the formal call center.
**Process Best Practices**

The most obvious best process practice is to provide remote agents with the tools and resources they need to properly do their jobs. The same advanced contact center management tools and resources that are available to formal contact center agents MUST be provided to remote agents. This includes computer telephony integration and access to customer history and information in order to best service the customer, access to knowledge databases, and other resources available to brick-and-mortar based agents. Without these tools, remote agents may not be able to solve the customers’ issues, resulting in customer dissatisfaction, and potentially lost revenue. Also be sure to provide remote agents with the appropriate levels of authority and access to do their jobs. There is nothing more frustrating to customers than interacting with an agent who can’t solve their problem because they don’t have the authority or access to do so.

Similarly, contact center managers and supervisors must have visibility to the remote agent, with the same reporting, recording, monitoring, staffing, and workforce optimization capabilities extended to remote agents. Reporting, recording and monitoring are critical in ensuring quality control of remote workers, and help overcome some of the objections to using remote agents. Tools to ensure information security and confidentiality are required, guaranteeing that data is not leaked due to malware. Recording 100% of the remote agents’ calls, plus the use of analytics to identify issues and trends, as well as after-call customer surveys, helps to ensure that the expected quality and performance is being met.

Additionally, communications between remote agents, their supervisors, managers and subject matter experts is even more important than for in-house agents. Establish a formal communication process between agents and supervisors, and put in place any tools to help facilitate ongoing contact. For example, UC tools such as chat and video conferencing can help remote agents feel connected and less isolated, and allow the supervisors better visibility into how their remote workers are doing.

Finally, reward at-home or remote agents in the same way with the same visibility as in-house agents. Where possible, enable remote workers to take part in any company festivities, either by giving enough notice for them to join, or set up something remotely with other remote workers.

**The Social Media Boom – Friending and Tweeting**

Do you tweet? The most exciting recent addition to the contact center is the use of social media (or social software) sites such as Twitter and Facebook as customer service channels. More and more people are turning to these sites in order to bypass calling or sending an email to a company, in hopes of getting faster, more personalized service. Rather than looking for the customer support phone number, going through an IVR menu, and waiting on hold for a live agent, more and more customers are utilizing social media for fast responses to relatively simple problems. Getting attention from a company can be as simple as going to their Facebook page, or sending a “tweet” to their Twitter address.
According to various industry experts, less than 10% of contact centers currently integrate social media. However, the number of companies using Twitter and Facebook, and other social software services to interact with customers and provide customer service is increasing. Companies such as Comcast, Dell, JetBlue, and Zappos are leading the charge. Many are beginning to recognize that they can use social media channels to engage with customers, resolve customer problems and issues, get feedback, and build goodwill for their brands. For this scenario, remote agents are ideal — provided they have the tools and resources needed to best serve customers. The Internet never sleeps, and remote social media agents can provide service 24 hours a day, from any location.

Social media outlets can be flexibly integrated into a multi-channel contact center. Some companies may choose to use dedicated agents for social media interactions, while others opt for blended agents. For example, a company can use agents to monitor chatter, or calls can be routed to agents after they are mined from social media chatter, and agents can respond accordingly. For companies turning to social media for customer service and customer interaction, the use of remote agents can be an effective way of staffing for this new channel.

**Social Media to the Rescue**

One of the most enticing aspects of this emerging channel is that it can also benefit the remote agent. Social media tools can help overcome one of the biggest challenges to the use of remote agents — the lack of communication between agents and supervisors, and the isolation agents experience when they are not in the main contact center facility. Often times the agents are unable to interact with other employees for social purposes or to access information. With today’s unified communications and social networking capabilities, this is no longer an issue.

As we have seen with companies such as RDI and ViPdesk, Instant Messaging (IM) and live chat lets remote agents interact with their supervisors and managers, as well as other contact center agents. Some companies use chat rooms for remote agents to communicate with each another, as well as internal message boards and wikis for agents to collaborate to solve problems and to share and have access to necessary information to do their jobs effectively. UC and social media capabilities let remote agents share information about their experiences and get immediate feedback from their peers and supervisors. For supervisors and managers who like to hold meetings and see their workers, inexpensive desktop video conferencing lets remote agents and supervisors have more personal interactions.

Once again, Salmat developed an internal social media platform to let its 400 home-based agents interact via an online interactive community, including chat rooms, forums, blogs, information bases, IM, and more. Agents use IM to get answers to questions, and can interact with their supervisors via IM and chat, and even have social interactions and games via the interactive community.
Have We Convinced You?
The use of remote agents is growing — will you be part of this trend? If your company deals with seasonal fluctuations, has locations across the globe, is looking for a way to improve customer service while reigning in costs, and need to find and retain top contact center talent, the answer should be yes. Using remote agents is an economical way to be competitive, while providing employees with work-life balance alternatives that benefit the environment and the bottom line.
Case Studies

RDI Marketing Services

Excellence in Execution

http://www.rdioutsourcing.com

In business for over 30 years, RDI is a world-class outsourcer of contact center, administrative services, and market research, across all verticals. Approximately 950 of the 1,100 people in the company are agents, providing both inbound and outbound services in customer care, sales and service, in four service centers, including a bilingual facility in Arizona.

RDI’s remote agent model is a bit different than most. Of the 950 agents, about 5% work at home, which is considered a perk. In most cases, agents have excelled at their work in the contact center and were promoted and allowed to work from home.

What makes this work for RDI? Being able to promote the best people who have proven themselves on the job and seem suited to work at home, into an at-home position. Organizationally, these agents are treated the same as every other agent, and are integrated individually into various campaigns as needed. Calls are routed to the agents by skills, and the remote agents use the same tools as other agents, including chat and presence capabilities to access and interact with supervisors and subject matter experts, if needed. At-home agents are also monitored and managed exactly the same way as other agents. RDI uses a model that lets the agent be close enough to the brick and mortar center so they can visit the center if necessary.

To get started working remotely, agents are required to provide company-paid for bandwidth, and receive a preprogrammed plug-and-play unit, cutting down on complexity, and ensuring consistency in equipment. In order to assure data security, RDI has employed a double security system for logging agents in remotely. RDI also insists on a separate quiet work environment, with rules around outside distractions. 100% of remote agent calls are recorded, which means the company can ensure that remote agents adhere to the rules around a quiet environment. All training is done at the brick and mortar facility, and to stay in touch, all agents are required to come in and work at the contact center once a month.

Using remote workers has had many benefits for RDI, including a low attrition rate. For example, RDI has found that in cases where they might have lost people who could no longer come into the office, such as new parents, they were able to keep quality people by letting them work from home. RDI has also discovered that they can attract workers with a higher skill level, such as retired schoolteachers or people with professional backgrounds.

Finally, RDI says that work-at-home agents allow them to expand and contract faster, and its practice of pre-loading workstations has allowed the company to be able to ramp up and have more agents work at home in case of disaster.
VIPdesk

If you truly want to see remote agents at work, you won’t find them in VIPdesk’s headquarters in Alexandria, VA. The majority of the company is virtual—100% of the company’s agents and over 80% of its corporate team work from their home offices throughout the U.S. and Canada—and have been since 2000. This makes VIPdesk one of the earliest adopters of the virtual contact center model.

Global industry leaders in the retail, travel, finance, hospitality and consumer products industries trust VIPdesk to enhance their brands through the company’s customer care and loyalty programs. VIPdesk’s full suite of Brand Experience Management solutions includes Concierge Services, Customer Care Services, Social Media Management, Experiential Programs, IVR Services and Voice of the Customer Surveying & Analytics.

VIPdesk refers to its customer service representatives as “Brand Ambassadors”, due to the high value that VIPdesk places on the relationship between a company’s customers and the customer service representatives with whom they interact. Brand Ambassadors are hired based on both enthusiasm and passion for the products and services they support, as well as deep knowledge of the brand they will represent. For example, a Brand Ambassador representing a hotel chain would have to possess experience working in the hotel industry, while a Brand Ambassador providing customer service for an outdoor camping and sports equipment retailer would be required to have demonstrated knowledge and passion for the outdoors.

VIPdesk manages Brand Ambassadors through performance based scheduling—which means that all agents know the performance metrics they will be measured on, and the Brand Ambassadors with the best performance get their ideal schedules. This style of management, combined with the passion inherent in every single Brand Ambassador results in a memorable customer experience, shown via VIPdesk’s track record of success. VIPdesk’s Brand Ambassadors have shown results for clients including increased average order size, increased sales conversion rates, decreased average handle time, increased first contact resolution and more—without an added sales push — through effective use of the remote agent model.
COMMfusion LLC
COMMfusion LLC is an independent industry analyst and consulting firm, providing market research analysis and consulting services on unified communications and communication convergence markets and technologies, aimed at helping end-user, vendor, and reseller clients both strategically and tactically.

Our core areas of coverage and focus include: Unified Communications, Unified Messaging/Voice Messaging, Contact Centers, Computer Telephony Integration (CTI), Collaboration and Conferencing, Internet Protocol (IP) Telephony, and voice/data convergence applications.

Blair Pleasant, President & Principal Analyst, has over 20 years experience as an industry analyst, understands the market dynamics and challenges in these areas, and provides an objective perspective and insights to clients.

Jamison Consulting
Jamison Consulting is an independent industry analyst and consulting firm that provides in-depth market research, analysis and insight to clients in the areas of unified communications, speech technologies, contact centers and related emerging areas. Our mission is to delve into these technology markets to explore how each technology affects the end user, from the executive, contact center manager, reseller, and applications developer, to the retail customer.

Nancy Jamison, President & Principal Analyst, has over 30 years of industry experience in the contact center, and enterprise communications markets, an industry analyst and brand manager. She applies her broad knowledge of the industry and expertise in marketing in helping clients develop and deliver solutions to the market from both a tactical and strategic perspective.
**Interactive Intelligence, Inc.**

Interactive Intelligence Inc. (Nasdaq: ININ) is a global provider of unified business communications solutions for contact center automation, enterprise IP telephony, and business process automation.

The company has developed an all-in-one IP communications software suite that’s scalable and standards-based, offering single-platform architecture with inherent multichannel processing to deliver comprehensive applications minus the cost and complexity introduced by multipoint products.

Founded in 1994 and backed by more than 3,500 customers worldwide, Interactive Intelligence is an experienced leader delivering a comprehensive solution-set composed of premise-based and on-demand Communications as a Service (CaaS) offerings, including software, hardware, consulting, support, education and implementation.
The Authors

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With 20 years experience, her primary areas of focus are convergence applications, including Unified Communications, the contact center, computer telephony integration (CTI), Unified Messaging and voice processing. Blair has authored many highly acclaimed multi-client market studies and white papers, as well as custom research reports, and provides market research analysis and consulting services to end user and vendor clients.

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Jason Alley has a broad and deep background in the area of customer interaction. For the first six years of his career, he served as a product manager and strategist with companies such as Nortel, Aspect and Hipbone (a web collaboration company acquired by Kana), and over the next 10 years was a consultant for enterprise customers and suppliers for Vanguard Communications and a company he later founded, SmartContact Consulting. Jason now serves on the solutions marketing team at Interactive Intelligence. His unique blend of end-user and supplier experience equips him with a fresh, comprehensive perspective — something he strives to infuse in every project. Jason holds a bachelor’s degree in business economics from UCLA.