



Applying BI to Voice Communications:  
*Taking Technology Investments to the Next Level*

F R O S T  S U L L I V A N

A Frost & Sullivan White Paper

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## INTRODUCTION

Communications needs have changed for businesses of all sizes. In today’s online, on-demand world, customers expect immediate attention and action or they quickly turn to alternatives. Customers know they have power, and they readily wield it to get faster service, lower prices, and personalized experiences. This article discusses how smartly pairing communications technology with business data can help companies better serve and retain customers, and open new revenue opportunities.

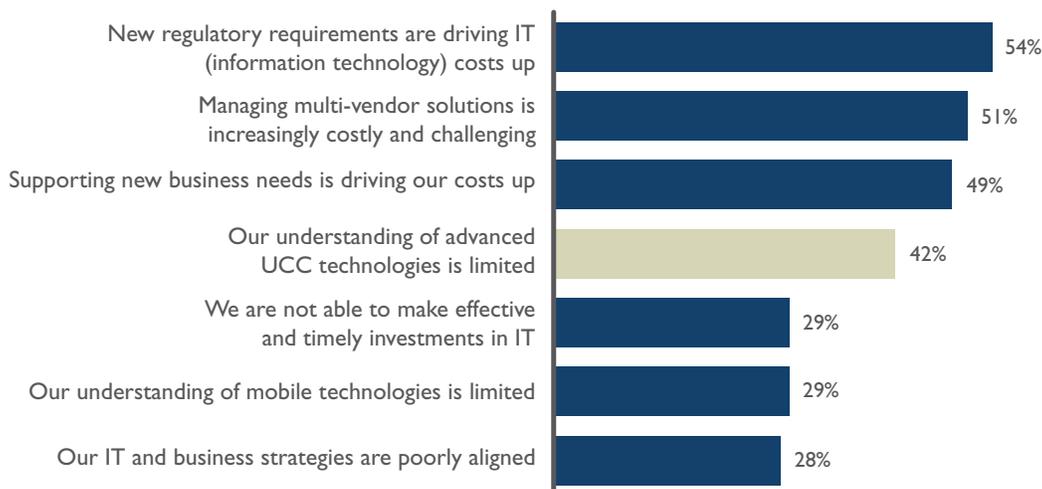
## THE VOICE AND DATA DISCONNECT

Many businesses have invested in IP communications tools such as IP telephony, unified messaging, multi-media conferencing, and mobile clients to save money and increase productivity. Many organizations have also deployed data-capture solutions such as customer relationship management (CRM) and enterprise resource planning (ERP) applications to collect information and build greater efficiencies into their business.

These investments are driven by a need to streamline operations and address specific business pain points. For example, ERP is commonly used to improve operations; IP telephony, IM, presence and unified messaging are implemented to enhance flexibility and productivity; and contact center solutions and CRM can help increase customer satisfaction, improve customer retention, and reduce churn.

Although these applications may have met the needs for which they were originally purchased, companies must now consider how these same tools can deliver added value to their future operations. That is because shifts in business and societal conditions call for more sophisticated use of technology. According to a Frost & Sullivan survey of 1,028 company decision-makers in the US and Europe across a variety of industries, half of respondents are challenged by the costs involved with supporting new business needs and nearly one-third believe their present information and communications technology does not adequately support their current business goals.

### Exhibit I - Attitudes toward IT Challenges - Percent Agree/Strongly Agree: United States and Europe, 2013



Base: All respondents (n=1,028).  
Please rate your level of agreement with the following statements.

Source: Frost & Sullivan

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they gather more useful

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A quick and effective way to address these issues is to integrate new functionality into existing applications. For many companies, the logical step is to create business intelligence (BI) solutions by marrying back-office databases and systems with communications platforms. In short, companies need to improve data collection and make information they gather more useful than it has been in the past. This sounds simple, but the majority of efforts to implement BI in small and mid-size businesses have been unsuccessful for a number of reasons:

- BI solutions have historically catered to large enterprises, making them too complex and expensive for most small and mid-size businesses. As a work-around, some companies take a do-it-yourself approach. These bolted-together solutions are typically loosely integrated, buggy, error-prone, and constant sources of frustration for users and IT support staff.
- Traditional BI solutions put the onus on companies to make large up-front investments and to maintain certified in-house support staff, which puts companies at risk of locking into a product that does not meet all their needs, particularly as their requirements change.
- Voice calls are often omitted from otherwise automated, multi-channel interaction logging within the data-capture platforms (e.g., CRM and ERP) that businesses want to integrate into their BI solutions. Furthermore, call recording applications and basic computer telephony integration (CTI) that merely enable screen pops of inbound caller details are poor substitutes for advanced BI capabilities.
- BI solutions have traditionally focused on employee-driven data capture using screen-pop software, rather than on standardizing information capture company-wide enabled by back-end system connectors. And because voice interaction logging into CRM or ERP systems is often a manual process, it is typically plagued by human error, apathy, time constraints, and latency. These factors combine to result in inaccurate, incomplete, outdated, and often unusable data.

## BRINGING CLOUD INTO THE EQUATION

Technology providers such as Vertical Communications are tackling these challenges with a new class of cloud-based solutions that help small and mid-size companies avoid wasted opportunities and gain the business efficiencies they seek in their information and communications technology investments. The value proposition of cloud solutions continues to be solidified and proven, and more companies are reaping the benefits.

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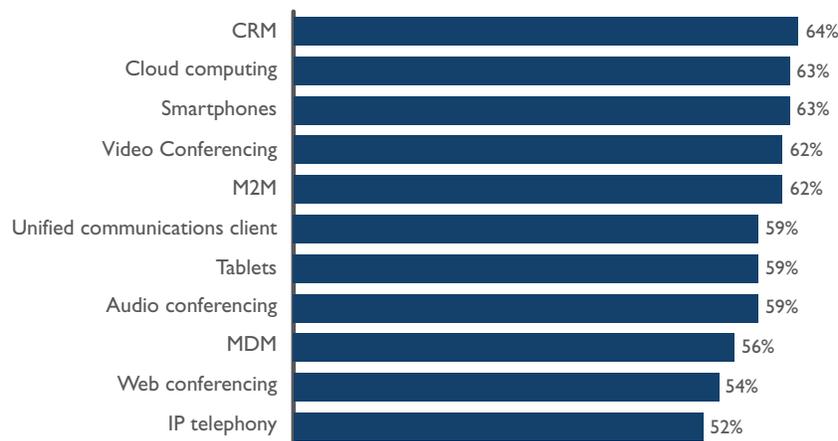
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- Outsourcing applications and services from the cloud eliminates large upfront capital requirements as well as the associated risk and support burden of ownership. Additionally, cloud services’ operational expense (OPEX) model provides predictable monthly charges, rapid roll-out, and on-demand capacity adjustments that are simply not available with on-premises alternatives.
- Increasingly, company decision-makers are looking to outsource the complexity associated with owning and maintaining advanced technology solutions. They are turning to trusted providers from whom they are outsourcing IT to the cloud. The approach allows company leaders and staff to focus on business value rather than on the technology itself.
- Companies are strategically sourcing specific components from the cloud, such as voice-to-CRM connectors, that can integrate with existing applications with greater speed and minimal disruption. The goal is to enhance processes by automating tasks such as data collection, improve business insight by analyzing large volumes of data, and enhance agility through more granular reporting.

## GIVING BUSINESS INTELLIGENCE A VOICE

Although communications tools such as video and IM/chat are newer and flashier, Frost & Sullivan research finds that a majority of businesses agree that their CRM investments perform at a highly satisfactory level in terms of supporting their business requirements.

### Exhibit 2 - Key Challenges Faced by IT



*Base: Filtered respondents. Sample sizes by technology are located in the Appendices.*

*For each statement please indicate how much you think the statement describes the technology: Overall highly effective technology for our company.*

*Source: Frost & Sullivan*

For years, companies have captured information about their customer interactions, primarily from text-based communications such as email, chat, Web queries and Web self-service. They do this to gain insights, or intelligence, about shifts in customer tendencies and demand. But despite the continued importance of the voice channel, critical details from customer phone calls are often not recorded to the same extent as other communications channels, and therefore are not included as part of traditional BI solutions. Valuable information from volumes of voice interactions with customers goes to waste.

Today's forward-thinking organizations are seeking to better leverage the full value of voice interactions. By automating voice-interaction logging to capture data such as customer preferences and patterns, companies can gain access to a larger expanse of important information—data that can drive business efficiencies and open new opportunities. Thought-leading organizations require solutions that capture everything about voice calls and input the information into ERP and CRM systems with speed and precision. Once this valuable data is captured, it is equally important to retrieve it in meaningful ways. The ability to organize, analyze and report on the information is key to making data relevant and purposeful.

By automating the capture of voice-call information, company staff can focus on conversations with customers and higher-value tasks, not on data entry. Furthermore, interactions that are logged consistently and accurately can help a company build its knowledgebase and use this to provide employees appropriate and timely information needed to proactively mitigate issues and act on up-sell/cross-sell opportunities that may not otherwise be apparent.

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With a greater volume of more accurate, timely and contextual information, data becomes actionable. Companies can employ analytics and reporting to improve insight and agility. Changes in customer patterns and demands can be identified earlier to enable companies to anticipate unfavorable conditions, address potential issues, and to prepare for and capitalize on new opportunities. For instance, companies can use this rich information to build sales and marketing campaigns; create rules-based routing that consistently connects customers to the most appropriate company staff (e.g., client services, sales, technical support, etc.); map inventory and logistics to inquiry patterns; tune staffing levels or business hours to address real-time and emerging demand trends; and more.

## CONCLUSION

In today's business climate it is unreasonable to expect to get ahead by using the same, limited toolset as everyone else. It is time to take the next step in technology evolution and business enablement. Leading providers such as Vertical Communications, with its CRMLink solution, are enabling opportunities to add value to current investments and reap the benefits of business intelligence in ways that are cost-effective, low risk, and high reward. BI can enhance the performance of nearly any employee, line of business or company. The most effective business intelligence tools capture and make data actionable, including all the details from the voice communications that remain pervasive in every business.

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