

With thousands of customer service representatives, growing customer frustration, a spate of recent mergers and acquisitions, and increasing operational costs, one of the world's leading financial services institutions turned to CICERO® as "an ideal solution to address customer service and cost-containment issues inside its many contact centers." Within eight weeks, Level 8 developed, tested, and successfully deployed a CICERO® desktop solution that integrated the customer's required applications - quickly realizing higher levels of customer satisfaction, increased process automation and ROI.

Growth and New Challenges

A leading Financial Services Institution (FSI) was faced with escalating contact center operations costs and declining customer satisfaction. Over the last few years, the FSI acquired numerous contact centers through mergers and acquisitions. Located throughout the United States, these contact centers were organized by specialty, geography, type of customer relationship, or product offerings.

Customers calling the FSI with questions outside a particular center's business function would be transferred to the appropriate contact center. In many cases, customers were instructed to redial a different toll free number to access the required expertise and appropriate business application for their needs. This resulted in increased customer-handling time and rising costs to process even the most routine calls, as well as substantially increased customer frustration and complaints.

A part of the original, pre- CICERO, approach to reducing the number of call transfers and customer complaints was to train and equip the FSI's Customer Service Representatives (CSR) to be conversant with a wide range of complex business applications and processes, many acquired through M&A. In that way, CSRs would be better equipped to handle the rising volume of diverse customer calls. Multi-faceted or complicated calls could then be routed to specialist contact centers via Genesys T-Servers, with agents ideally handling multiple customer inquiries during a single phone call.

Additionally, the contact centers' problems were compounded by the urgent need to integrate disparate business processes and enterprise applications into the FSI's new global operating environment. After lengthy analysis, the FSI determined that the 'perfect' solution would:

- Create a user-friendly solution that would realize a positive response from the CSR's and generate greater customer satisfaction;
- Allow a quick and effective way to train the CSRs on multiple complex business systems, while decreasing operational and training costs and staff turnover;
- Resolve usability difficulties associated with the cross-platform integration of primary business systems, mission critical legacy applications, CRM systems and Web portals with CTI; and
- Defray the rising cost and complexity of data entry, including error correction and updates, as well as measurably increase CSR productivity.

"A uniquely effective solution on the agent desktop, CICERO does more than simply address call center efficiency, application integration and ROI concerns; it delivers a better working experience for the harried and over-stressed agent, while substantially improving customer satisfaction."

Dr. Jon Anton
Chairman and Principal Researcher
BenchmarkPortal

The CICERO Solution

To best satisfy all the requirements of its contact center challenge, the FSI spent considerable effort and money investigating potential solutions. However, nothing fit all the requirements until CICERO was discovered. After a lengthy and detailed evaluation process, CICERO was ultimately selected as the new enterprise development platform for creating an integrated desktop workspace: a common workstation platform where business applications were organized according to task, presented with a common look and feel, and enabled to share data in a secure, context-aware manner.

The CICERO desktop integrated CTI, key business systems, and numerous secondary applications in use in the contact centers and elsewhere within the company. The CICERO solution included a wide range of host platforms (mainframe, client server, Web, Windows, and even MS-DOS). A new service application was created that collected, managed and securely stored user logon credentials. This CICERO enabled service greatly simplified the CSR logon process with single sign-on capabilities. It also enabled CICERO to automatically restart legacy applications that timed-out during a user session. Applications integrated within the CICERO workspace included:

- Microsoft Windows, Office and other desktop productivity suites and tools
- Mission critical 3270, midrange and client server applications
- Web-based applications, Web Services and portals - inside the FSI or external
- A unique, irreplaceable legacy 16-bit MS-DOS application
- Other systems and business processes acquired through the FSI's mergers and acquisitions

Level 8 and the FSI worked closely to develop, test and successfully deploy the CICERO-based workstation in *eight weeks*. None of the company's business applications and few processes were modified during development



and implementation. Within just a few months, the FSI observed several key operational benefits of using CICERO:

Speed of development and deployment

- CICERO integration can be three to five times faster than traditionally packaged application integration solutions or middleware, contributing to much lower implementation and maintenance costs

Ability to integrate a wide range of applications without extensive modifications

- Minimizes the business and technical risks and cost of integration and ongoing application maintenance
- Reduces Total Cost of Ownership (TCO) and lifetime cost of platform maintenance and support
- Provides unequalled flexibility to add or change business applications and processes in an easy, consistent, enforceable and rapid manner.

Seamless integration of Genesys CTI with all applications used within the company's complex IT and contact center environment

- A key 16-bit MS-DOS application was integrated into the work environment - something that the FSI could not achieve in any other way.
- CICERO can integrate any application that has a "footprint" in Windows.

A highly flexible user interface

- Allows rapid customization of the user desktop to specific roles, security requirements and job functions
- CSR's can personalize the CICERO desktop with shortcuts to frequently used applications and tools without impacting security or performance
- Supports pop-up interfaces to multi-channel functions such as co-browsing, web, fax, and instant messaging

Availability of unique CICERO features

- CICERO Routines provide an efficient method of automating processes, training CSR's, increasing morale and improving productivity
- A CICERO InfoCenter provides real-time information to CSR's to better address customer needs
- A complete History tracking feature helps them identify training and operational problems and quickly develop solutions for staff productivity, IT performance, and cost containment

"This groundbreaking technology, ideal for the call center industry. CICERO provides a higher degree of automation, enabling our agents to focus more on the customer's needs and less on the complicated tasks involved in meeting those needs.

CICERO is already improving customer satisfaction and agent efficiency, reducing training times for new agents as well as contributing to reduced agent turnover."

Mark Ramirez
Vice President, Consumer Services
Arvato Services, Inc., A Bertelsmann Company

Getting Results

This customer has observed a number of operational benefits of using CICERO, both in business and technical areas. In daily use in the FSI for more than a year, CICERO has demonstrated its unique business value:

Business Benefits – Reduced Costs, More Flexibility, Higher Customer Satisfaction

- Substantial improvements in application ease-of-use
- Reduced operational costs in contact centers
- Reduced need for an expensive "big bang" CRM initiative
- Faster development and implementation of new business products and services
- Higher staff productivity, morale, and job satisfaction with reduced turnover

CSR Benefits – More Efficient, Better Trained

- Using the integrated desktop, CSRs can now handle many different types of calls, thereby reducing the number of costly call transfers and increasing customer satisfaction - while greatly simplifying staff scheduling. Call transfers have been reduced, at substantial cost savings.
- A task-oriented, intuitive desktop with point-and-click navigation has reduced training requirements and simplified use.
- CICERO desktop training for new CSRs is completed in just one day.
- Business application training is minimized because the use of the application for specific business tasks and many of the more difficult tasks have been automated. CSRs are no longer required to learn the entire application.
- CICERO features such as Routines are used to provide learning aids to help the CSRs learn new processes using less familiar applications.
 - Routines include step-specific instructions, many of which are now efficiently automated.

- The Routines feature enables management to improve best practices faster
- Increased Agent Efficiency
 - Point-and-click navigation reduces the time needed to move between applications.
 - Data sharing between applications reduces data entry time and data entry errors.
 - Initial sign-on times are reduced and legacy applications that timed-out are automatically restarted saving the CSR valuable time during a call.
- CICERO's rapid integration capability reduced the duration and cost of the implementation effort. The only alternative was to rewrite legacy applications or replace them with a costly CRM suite.
- CICERO streamlines the integration of applications, provides flexibility in setting up and maintaining a CICERO desktop, and accelerates the deployment of the solution from months to weeks.
- The FSI determined that a costly "rip & replace" approach to changing business systems does not provide any competitive or customer satisfaction advantage. CICERO provides the best "business-focused" solution through its unique, powerful and cost effective desktop-oriented application integration capabilities.

IT Benefits - Reduced Operating Costs and Increased Customer Satisfaction

- CICERO's History feature provides valuable information to support the decrease in call transfers and increase in CSR ability to handle multiple customer service issues concurrently. This feature along with other customer analytical tools helps build a strong ROI to support the business requirements.

CICERO: Integration at the Point of Contact™

CICERO's ease of navigation, elimination of redundant input and process effort, and its resulting operational flexibility, resulted in significant annual savings for this Financial Services Institution - well above its 10%+ target.

CICERO provides substantial cost savings associated with greater CSR efficiency as well as higher morale, reduced turnover, and job-related stress. It yields greater bottom line results through more effective inbound cross-selling, up-selling, and customer relationship management. CICERO's intrinsic value is easily demonstrated in the many ways it changes the contact center service equation: reducing operational and staffing costs, satisfying customers, efficiently taking care of their inquiries where it makes *BUSINESS* sense - at the point of contact.

To learn more about CICERO and Level 8 Systems, please visit our website at www.level8.com or call us at 1-866-LEVEL-88.