



INTERACTIVE INTELLIGENCE
Deliberately Innovative

Case Study

Contact Center Automation

- Multimedia Recording & Quality Monitoring
- Customer Feedback Management
- Outbound/Blended Dialing & Campaign Management
- **Network-based Pre/Post-Call Routing**
- Web Self-Service & Knowledge Management
- Workforce Management

Enterprise IP Telephony

Enterprise Messaging

Summary

Customer: SurfControl



Headquarters: Scotts Valley, CA

Industry: Software

Challenge: Replace heterogeneous, proprietary and geographically distributed telephony systems with centralized, IP-based communications system capable of supporting a global organization with multiple customer contact points, including phone, fax, email and the web.

Solution: *Customer Interaction Center®* (CIC) is an all-in-one contact center software suite. *Interaction Director®* is a network-based pre- and post-call router for monitoring voice traffic across sites. *Interaction Marquee™* is a statistics engine used to display information from CIC onto contact center wallboards

Benefits:

- 10 percent increase in agent productivity using CIC's automation features
- 10 to 50 percent improvement in quality of customer service using CIC's reporting features to institute an agent incentive and rewards system
- Improved performance using CIC's supervisory application for immediate visibility into call-handling statistics
- Faster and more effective sales and service using CIC's integration to the company's Salesforce.com CRM system
- Faster and more effective sales and service using CIC's "follow-the-sun" and "follow-me" features for round-the-clock access to the most appropriate agents, including subject matter experts

SurfControl Deploys Interactive Intelligence Software for "Follow the Sun" Customer Service

About SurfControl

SurfControl provides a portfolio of security solutions to protect its customers from Internet threats, while delivering business and regulatory compliance and enabling business continuity. SurfControl was founded in 1997 and employs more than 600 people worldwide with headquarters in Scotts Valley, California; and offices in Sydney, Australia; Manchester, United Kingdom; Beijing, China; Israel; France; Germany; and several other countries. The company protects nearly 16 million people employed by more than 25,000 customers worldwide. Customers range from small law offices and schools to large retailers and global corporations. SurfControl can be reached at <http://www.surfcontrol.com>.

The Challenge

Growing principally by acquisition, SurfControl had inherited many diverse PBXs and telecommunications systems.

"We had the task of integrating several different PBX and voice mail systems following these acquisitions," said Max Rayner, SurfControl's chief information officer and executive vice president of products and services. "This created technical limitations and made it difficult for us to respond to new business demands. Our IT organization quickly saw that continuing along this line would make system administration very cumbersome, and pose roadblocks to business innovation."

The technical limitations of a diverse set of propriety PBXs generated high maintenance costs and forced traveling employees to figure out how to use each system when visiting different offices. The lack of a uniform telephony platform also constrained SurfControl from implementing new applications that could enhance its sales and service.

"We wanted to provide 'follow-the-sun' customer technical support, which would require that systems interconnect and work together for transfers across sites," said C.T. Woo, SurfControl's vice president of information technology and Internet engineering. "This was not achievable with our legacy systems without limitations and workarounds. The ongoing pain caused by outages and limitations became a decisive factor."

The Solution

SurfControl identified five critical requirements for its new telephony solution:

- Voice over IP communications that reduced the expense of long distance calling for a global organization
- The ability to re-route calls at any time to subject matter experts, or use it to offer "follow-the-sun" customer service to take advantage of agents distributed around the world
- Intelligent queuing that could complement the decision process for call routing determination
- Productivity tools and integration to key systems like customer relationship management (CRM) packages for sales and customer service employees
- Faster training and ongoing support

"At the onset of our proposal process, we selected five different vendors to interview and quickly narrowed our choice to two," said Jim Keller, SurfControl's director of network security and telephony.

"Interactive Intelligence demonstrated major differentiation when its team came to our site and configured a call center on the spot with all the features we needed."

Because it was heavily reliant on web-based technology, SurfControl also put a premium on a solution that would optimize customer touch points by phone, fax, email and online so it could deliver fast and consistent service every time.

"Interactive Intelligence gave us a sophisticated IP-based 'interaction engine' designed to automate virtually every aspect of business communications," Keller said. "Its CIC software acts as a central point of control, whether customers choose to communicate with us by phone, fax, email, or the web. This unique architecture eliminated the need for costly and complex integration, and provided us with a single point of administration, customization and reporting across sites."

The solution designed and deployed by SurfControl's network security and telephony team and its partners consisted of products from Interactive Intelligence and Cisco. Cisco's architecture for voice, video and integrated data (AVVID) provided a VoIP infrastructure over a global multiprotocol label switching (MPLS) network. The Interactive Intelligence contact center automation software, Customer Interaction Center® (CIC), provided the applications for seamless handling of customer interactions. KRP Communications functioned as system architect, designing a redundant dual-server contact center solution for each of three geographically separate sites.

"As a result of CIC's automation features, such as ACD and IVR, it now takes nine people to do what 10 people used to do in our contact center."

SurfControl deployed CIC's Interaction Supervisor™ application for real-time supervisory monitoring, along with automatic call distribution (ACD), interactive voice response (IVR), call recording, unified messaging, and other interaction management features. CIC supports about 300 contact center agents and about 300 business users across distributed sites.

SurfControl also purchased the Interactive Intelligence Interaction Director® module, which provides network-based pre- and post-call routing across sites, along with Interaction Marquee™, a statistics engine used to display information from CIC onto contact center wallboards.

"We beat our deployment schedule by getting the entire system worldwide up and running in just nine months," Keller said. "Given that we concurrently upgraded all of our global WAN/LAN systems, this marked an even greater accomplishment."

The Benefits

"As a result of CIC's automation features, such as ACD and IVR, it now takes nine people to do what 10 people used to do in our contact center," Rayner said. "This amounts to a 10 percent gain in agent productivity. And since we've consolidated multiple systems down to one, we've reduced end-user training time, which means faster return on investment."

SurfControl also credits CIC's Interaction Supervisor™ application for providing valuable tracking benefits.

"For any given customer, CIC gives us real-time visibility into metrics such as call volume and talk-time," said SurfControl's vice president of sales for the Americas, Mark Calkins. "Now we can monitor metrics 'by-the-minute' instead of a once-monthly report, which has helped us improve overall contact center performance."

The new system has also enabled SurfControl to roll out a new sales incentive and reward structure for its agents.

"CIC's reporting capabilities have enabled us to institute a sales incentive and rewards program for agents, which has improved our overall quality of customer service by between 10 and 50 percent," Calkins said.

Integration between CIC and SurfControl's Salesforce.com CRM package has further improved the quality of sales and service interactions with customers.

"The integrated system presents 'screenpops' with detailed account information and offers simple 'point-and-click' account dialing for faster customer service," Calkins said. "As a result of this integration, we've also improved the accuracy and performance of our CRM system, which has resulted in improved quality of service as well as increased sales."

CIC's "follow-me" feature, combined with Interaction Director® have also added to improvements in service and sales by flexibly routing interactions across global sites based on a number of flexible criteria, such as time of day, day of week and agent availability, according to Calkins. "This also enables us to take advantage of subject matter experts regardless of their location," he said.

CIC also enables customers to leave a callback request in the event a sales or technical support representative is busy. This option maintains the customers' place in queue, and prevents them from wasting time on-hold.

"The end result for our prospects and customers is optimal response to their questions and issues, and for our own management, full visibility," Rayner said. "Overall, CIC's flexible architecture has meant we no longer have to make customer interaction business decisions based on technical limitations."



Interactive Intelligence Inc. (Nasdaq: ININ) is a global provider of unified business communications solutions for contact center automation, enterprise IP telephony, and enterprise messaging. The company's innovative standards-based, all-in-one communications software suite was designed to eliminate the cost and complexity introduced by multi-point vendors. Founded in 1994 and backed by more than 3,000 customers worldwide, Interactive Intelligence is an experienced leader delivering maximum customer value through its comprehensive solution-set comprised of premise-based and hosted offerings, including software, hardware, consulting, support, education and implementation.

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