

PDX, Inc. Meets the Future With Microsoft Lync and ComputerTalk ice



Pharmacy Services Firm Sustains Rapid Growth With Advanced Unified Communications and Contact Center Platform

The Situation Needing to Fill the Call Center Gap

Microsoft's unified communications platform, now called Microsoft Lync 2010, can work wonders in streamlining business messaging and enhancing team collaboration, but the platform still contains one gaping hole: Lync has no contact center support. So when Fort Worth, TX-based pharmacy software vendor PDX, Inc. wanted to take its customer support to a higher level and leverage its contact center's expertise more effectively, the company knew it needed help.

Background Taking Communications Into the 21st Century

For decades, businesses have standardized on private branch exchange (PBX) systems for features such as auto attendants, call forwarding, on-hold music, voice mail, and several important reporting functions, but they remain stuck in the paradigm of a voice-only world. With the rise of ubiquitous broadband, voice has become little more than a bullet point in business communications. Today, companies also rely on email, instant messaging, online whiteboard collaboration, videoconferencing, and more as ways for colleagues to exchange ideas and be more productive. All of these, including voice, collectively fall under the umbrella of unified communications (UC).

With instant messaging also comes "presence," meaning a color-coded icon system by which users can see if other members of their UC network are available, busy, or away. Presence might also pull in a user's calendar data to reveal how much longer a person will be available. Consider how many minutes and hours get burned every month in dialing someone who's busy, leaving a message, trying another person who turns out to be busy, and so on. Simply having presence data to show if a colleague is available for a quick IM or voice call can dramatically improve a work group's efficiency.

PDX, Inc. discovered the benefits of unified communications in early 2009 when it adopted Microsoft's Office Communications Server (OCS) 2007.

"We chose OCS due to its lower price point compared to other vendors such as Cisco or Avaya and because of the tight integration with our existing infrastructure," says Jarrod Johnston, Director, IT for PDX. "In addition, the OCS product line allowed us to move all of our audio and video conferencing in-house and lower our monthly costs dramatically for conferencing services. One great part was that we didn't have to wait until everyone had been converted to the OCS platform. Once we had the conferencing services deployed, our entire user base was able to take advantage of the service."

However, even after OCS deployment, PDX still had many of its staff still using the company's Avaya Definity G3-series PBX for their primary telephony. These users were gradually migrating to Microsoft OCS, but the process was, as Johnston says, "relaxed." On one hand, some workers were comfortable with a traditional desk phone and dial tone, but the trade-off was that these users couldn't realize the same convenience and productivity as those who were 100% on board with UC for all communications. Every user who remained on the PBX negatively impacted the company's ROI.

Clearly, while the move to unified communications was saving PDX money on telephony and making sense on bottom line operational efficiency, there were still opportunities for PDX to realize even greater communications benefits.

PDX's Dilemma When Growth and Communications Collide

PDX maintains a contact center for its pharmaceutical clients. In 2007, PDX's six-year, \$100 million project, called the Enterprise Pharmacy System, went live. Ever since, rising demand has pushed PDX to add agents and expand support through its contact center. The entire organization is under pressure to become more efficient and tightly integrated.

PDX understands that there's a right way and a wrong way to add resources. Planting more people in a contact center without having the proper tools and processes in place can be a recipe for frustration and waste. OCS 2007 was good, but management wanted that PBX gone at the first chance, and it wanted the new feature benefits of Microsoft Lync 2010. One of the top priorities was gaining Lync's Skill Search capabilities.

Under Lync, every worker has a digital contact card filled out with his or her phone numbers, instant messaging ID, email address, and so on—as well as a few keywords describing the person's expertise specialties. With a feature called Skill Search that uses these keywords, a contact center worker who finds

himself stumped by a client's question could quickly do a Skill Search for the expert with specific skill needed to answer the question, see a list of people qualified to answer, simultaneously see which of those people were immediately available to respond, and have an answer via IM in seconds. This beats the old "please hold for five minutes while I call my manager" approach hands down.

Lync solved PDX's unified communications needs, but what about the missing contact center management functionality?

Complete Solution Microsoft Lync With ComputerTalk ice

Microsoft Lync provides the cutting-edge communication paths (phone, IM, video, etc.) needed to fuel a contact center. ComputerTalk's ice platform takes these communication strands, treats them as modular elements within a whole communications solution, and adapts each module into the specific needs of a contact center. For example, ice takes the Skill Search functionality of Lync and elevates it into skills-based call routing, potentially eliminating having a call land at an inappropriate support rep in the first place.

Additionally, the monitoring, administration, and reporting capabilities within ice give insight into real-time contact center activity. Far beyond the response group and queuing features native to Lync, ice delves into CRM to deliver pop-up client data for agents and reveals what those agents are doing, how their calls are classified, the live status of queues, and the amount of time taken for various tasks. ComputerTalk's system handles everything from call recording to after-call surveys, can use contextual intelligence to determine the reasons for calls, and can organize data into over 100 report types.

This depth of detail and the ease of its management hinges on the end-to-end integration found between Lync and ComputerTalk's platform.

"We went through a long process of looking for Automated Call Distribution [ACD] and skill-based routing products," says Donna Gizbert, Senior Vice President, Client Services at PDX, Inc. "We don't have anything like that in place with our help desk or support center, but we need to implement this so we can better manage our work force and understand our inbound calls, wait times, and call abandonment rates. A lot of the ACDs out there have to work with more legacy PBX telephony systems. We didn't need that. We needed something that would integrate easily, and we wanted someone with experience in working with OCS."

PDX evaluated several potential vendors for its contact center solution. While the field narrowed into a close two-horse race at the end, ComputerTalk ultimately won out for its platform's greater customizability, more intuitive user interface, and lower total cost of ownership.

Anticipated Benefits Proof of Progress

In the first quarter of 2011, PDX will deploy its dynamic Lync/ice duo. Unlike many companies, PDX isn't upgrading its unified communications with lower operating costs foremost in mind. True, communications costs with OCS have plummeted, and PDX's Jarrod Johnston anticipates just over a three-year ROI, even with the delayed dismissal of his company's PBX, all new handsets, and the purchase of some new IBM BladeCenters for the new server systems. But PDX's real motivations have less to do with ROI than they do with improving customer service.

"We want to report back metrics that allow us to convince customers that we're delivering a high level of service," says PDX's Gizbert. "Without ComputerTalk's tools, we can't do that. Also, we need to take the skills-based routing component and have a view into what our level-one agents are doing, so we can make sure we've got our staffing levels and schedules right and that we know they're working when they're supposed to be."

Ultimately, ComputerTalk's melding of Microsoft Lync and ice is about having a toolset that will allow businesses with contact centers to sustain their growth. Twenty-first century support groups live or die by their efficiency and customer satisfaction. As a market leader, PDX understands this and picked an integrated contact center platform able to assure that the company's future client needs will be met faster and more effectively than ever before.

About ComputerTalk

ComputerTalk is the most successful provider of cloud contact center and IVR solutions in Canada. Founded in 1987, its ice customers span Canada, the US, and UK. Household client names include 3M, BMO Mutual Funds, Globe & Mail, RBC Dexia, TD Securities, Federal, Provincial, and Municipal Governments. ice UC is a complete IP communications solution designed for Microsoft Lync 2010, and offered as both an on-premise solution or as a cloud service. ice UC communications-enables business processes, providing detailed analytics, sophisticated reporting, skills based routing, and real-time monitoring. ComputerTalk solutions address the real business challenges of the end user, and empower them to produce an ROI with measurable results.



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