

## Executive Perspective Series

March 2001

### Highlights

E-mail management software routes incoming e-mails to the appropriate agent, tracks e-mail status, and provides automatic response to e-mail inquiries.

An effective e-mail management system offers companies significant business benefits, including:

- Expanded opportunities for sales and service
- Improved closure rates for e-commerce transactions
- More effective deployment of customer service agents
- Faster, more responsive customer service
- Increased ROI

## E-MAIL MANAGEMENT OFFERS SIGNIFICANT BUSINESS BENEFITS

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### INTRODUCTION

In today's world, using e-mail to transact business is a fact of life. People today use e-mail as a substitute for a telephone call, and e-mail is fast becoming the new staple of communications. E-mail is the leading form of Internet usage—even greater than Web surfing and shopping, and it is expected to grow three to four times in volume over the next few years.

Many companies have expanded their call centers to handle e-mail, but become so overwhelmed with the number of incoming e-mails that automated help is essential. There are too many messages coming in, and with no connectivity between telephone and e-mail, the customer experience can be very disjointed. When a company makes a decision to service its customers via e-mail, it's time to invest in e-mail management software.

E-mail management software routes incoming e-mails to the appropriate agent, tracks e-mail status, and aids in responding to e-mail queries. E-mail management is quickly becoming the key to total customer management, and will continue to increase in importance as e-commerce and on-line service become more prevalent. If a company can't handle its customers' e-mail transactions, it stands to lose one customer after another to competitors who can—and will also miss out on a growing group of potential customers who do business exclusively on-line.

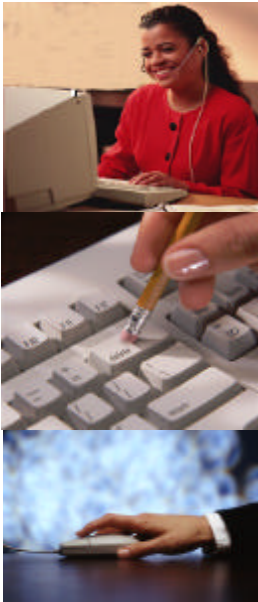
### E-MAIL MANAGEMENT SOFTWARE HELPS BUSINESSES SUCCEED

In this Internet age, why are many companies unsuccessful at managing their e-mail? One of the initial benefits of having a Web site, for many companies, is to sell their products and services 24x7, without employing a full staff of people around the clock. The next logical thought would be to do the same for customer service; but because most companies are ill-prepared for the onslaught of e-mail that comes through their Internet channel, it is almost impossible to keep up with responses on a one-to-one basis—yet that is what the customer demands.

Datamonitor research shows that most companies respond to e-mail either several days late, or not at all. Online shoppers' most frequent complaint is that their e-mail inquiries often receive no reply. Even if a company does not run a full-scale e-commerce operation, to succeed in today's competitive market, it is imperative to streamline processes to control, route, and track e-mail efficiently.



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E-mail management software can manage and track large volumes of e-mail from arrival through response. By automating receipt, acknowledgement, routing, queuing, and reply functionality, including service level management and reporting, e-mail management software provides businesses with thorough, efficient customer service.

With global inbound e-mail and Web forms exceeding 1 billion, and e-mail processing expected to exceed 230 million hours, call centers are quickly evolving into customer contact centers. This is where e-mail response systems come to the rescue.

Good e-mail management systems can handle high volumes of e-mail transactions efficiently and effectively, allowing contact center managers to process message queues, agents, service leads, and workflow rules in real time. High quality e-mail management software can also track e-mail from arrival through response, and provide automated receipt acknowledgment, routing, queuing, and reply. With a properly configured e-mail system, the response time goal can be reduced to minutes.

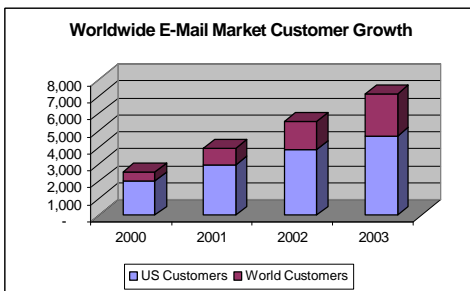
E-mail management software can help your company manage e-mail more effectively. This software can provide the customer with an immediate response with correct content, and helps your business manage e-mail channels without increasing the number of agents to handle the communication traffic. Ideally, the e-mail software should be integrated with other electronic communications channels, including voice, voice over IP, interactive voice response (IVR), facsimile, imaging, Web, and e-commerce systems, providing customers with consistent service, regardless of how they contact you. The result is improved customer retention, competitive advantage, up-sell/cross-sell opportunities, and a cost-effective way to deliver quality customer service.

A good front-end e-mail management system should be able to find and respond to frequently answered questions automatically, since many questions are repetitive. Most e-mail management systems allow for the directing of inquiries based on certain criteria, such as keywords. The software filters incoming messages and assigns them to queues and agents based on service level agreements, agent skills, and availability. A centralized library provides agents with standard responses to frequently asked questions, reducing agent response times and improving response consistency. This library can also be selectively published on the Web, to provide customers with an effective self-help option. Because e-mail management software can respond to e-mails for routine inquiries automatically, mail queues for agent assistance are greatly reduced. As a result, your customers get service faster, your agents spend less time handling repetitive inquiries, and your company saves money.

Without a routing and distribution architecture, administrators and agents must decide which e-mails get handled, and in what order. While the same routing and distribution methods used in phone calls could be applied to e-mail management, the implementation should be different because different “rules” apply. For example, you can have an e-mail “on hold” in a response queue for a couple of hours and still have the customer’s experience be positive, but you’d never leave a phone customer on hold for an hour. The e-mail management system should look at agent availability, the skills mix, and the type of inquiry, and then determine who will handle the e-mail—then forward it to the most appropriate agent. In addition, much e-mail is processed, when appropriate, using IVR-style logic so an agent doesn’t even have to answer the inquiry if necessary. The combination of auto response, intelligent routing, and queuing can be applied to e-mails, just as for telephony-based interactions.

### **IMPLEMENTING AN E-MAIL MANAGEMENT SOLUTION**

Once you’ve selected e-mail management software, there’s a process for implementing it effectively.

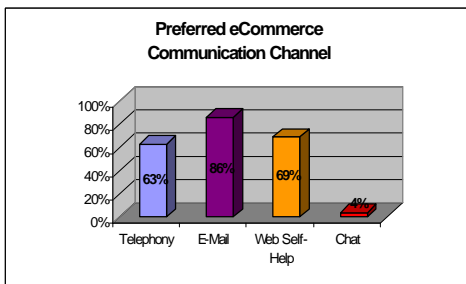


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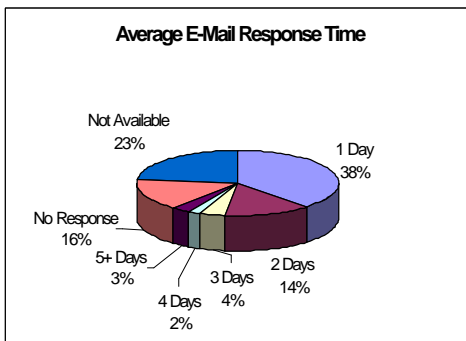


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■ **Internet-Based Customer Service will Slash Call Center Costs by 43%**  
 – Forrester



Source: Jupiter Communications



Source: Jupiter Communications

**1. Develop a model of the desired inbound and response environment.** This includes all e-mails, e-mail aliases, Web forms, faxes, etc., that will be received. These get mapped to skills within the organization. Once this map is created, you have the ability to start moving forward. This is a major factor to consider when selecting a vendor for a software solution. Many have a tendency to take shortcuts in this mapping process—there may be queues for sales, support, info, and help, but not topic- and analysis-specific information. Software should not simply map one-to-one on e-mail addresses without taking into account the response process.

**2. Allocate workflow.** The newly created model enables you to clearly identify categories for the inbound e-mail messages. The point of this stage is to build a second model that will allocate incoming work to the appropriate parties. Next, added to this model is the content analysis of inbound messages to ensure the highest probability of message routing to eliminate rework. The routing method is based upon detailed analysis of message traffic flow and historical message content (both inbound and outbound). It is important to invest the time up front to make sure this model is comprehensive.

**3. Develop a response process.** Once the routing rules have been identified and validated against the skill sets of the agents, a pre-production environment can begin taking “copies” of inbound e-mails for specific work on the response process. This is the most time-consuming part of the process, because you have to work with your agents to identify all necessary content to answer the messages, and to refine the routing to identify automatic responses and assisted responses. This is an iterative phase that takes time—build, refine, build again, refine again, build again, etc. However, once completed, you have effectively modeled the e-mail flow (based upon this flow and previous models) and have placed the right people in the right queues and groups to support the right type of message responses. Successful completion of this phase can significantly reduce the number of inbound messages that are redirected.

**4. Deploy the system.** After the response process has been developed, you can move into production and begin working on the reports and real-time monitoring to get the specific metrics for making bottom-line management decisions. This is most effective when using a live system, versus pre-production, since you can refine the monitoring and reporting features in a reality-based environment. At this point, you can make final system configuration changes.

**5. Refine the process.** To achieve optimum results, you should review the entire process after 90 days to ensure that new findings are captured in the routing, queuing, knowledge base, automation and reporting/monitoring practices. After this, you should conduct similar reviews about twice a year to make sure everything is operating at full efficiency.

**BENEFITS OF E-MAIL MANAGEMENT SOFTWARE**

As call center activity increases because of e-mail, e-mail management systems will be a tool for competitive survival. It is important to have a way of routing, processing, and queuing e-mail interactions, but it is also critical to answer as many e-mails as possible automatically. This keeps the e-mails to a manageable level while preventing agents from wasting time answering the same questions over and over again, rather than addressing those questions that require proper attention and research.

A main point to keep in mind is that e-mails are interactions—just like phone calls, faxes, or any other type of customer communication. Managing customer e-mails is just as important as managing their faxes and phone calls. When routine tasks are automated, and



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## About Quintus

Quintus Corporation makes software that helps companies serve customers over the telephone, Web, and e-mail. The company's flagship product suite, Quintus eContact™, helps businesses deliver first-rate service across communications channels while gathering the customer data needed to make informed, bottom-line business decisions. Quintus eContact is designed in modules, enabling companies to implement all or part of its functionality as their business needs dictate. Flexible and scalable, Quintus eContact works with a variety of platforms, legacy systems, applications, and back-office systems to provide a complete system for handling customer transactions and fostering customer relationships in today's highly competitive business environment.

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agents have immediate access to stored customer historical information, they can serve customers faster and more accurately.

As agents are more productive, ROI increases. With multimedia blending, routing and queuing, managers can pool their agent resources and proactively manage the call flow to further maximize productivity. By directing customers to a more convenient, lower cost method of customer service, companies decrease costs while, in turn, increasing ROI.

### **SUMMARY**

Using e-mail to transact business is a reality in today's economy. The Gartner Group predicts that the volume of e-mail messages generated by 2002 will more than double the volume generated in 2000. With e-mail quickly taking the place of a telephone call, it is fast becoming the staple of business communications. While many businesses have expanded their call centers to include e-mail, the number of incoming e-mails can be overwhelming, necessitating e-mail management software.

As businesses continue adding channels of communication to improve their customer service, they need to continually reevaluate their infrastructure and the business processes affected by these new channels of communication. Otherwise, they will drive their customers away because they cannot effectively communicate with them—despite the numerous customer service avenues available. The goal of adding multiple service channels is to serve customers—that's what e-mail management software helps businesses do. ❖



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