



# Contact Center Market Update

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**VoiceCon Spring**  
**Orlando, FL**

# Revisiting 2006's Predictions

- ❖ **Enterprise application integration capabilities will continue to be enhanced**
  - **Web Services will improve ability to integrate contact center operations and reporting with enterprise applications**
- ❖ **Data Center models for IP PBX and contact center**
- ❖ **Increasing number of hosted and multi-tenant options**

# 2006 Predictions: Enterprise Application Integration

## ❖ Avaya

- Communications Enabled Business Processes

## ❖ Genesys

- Business Process Routing

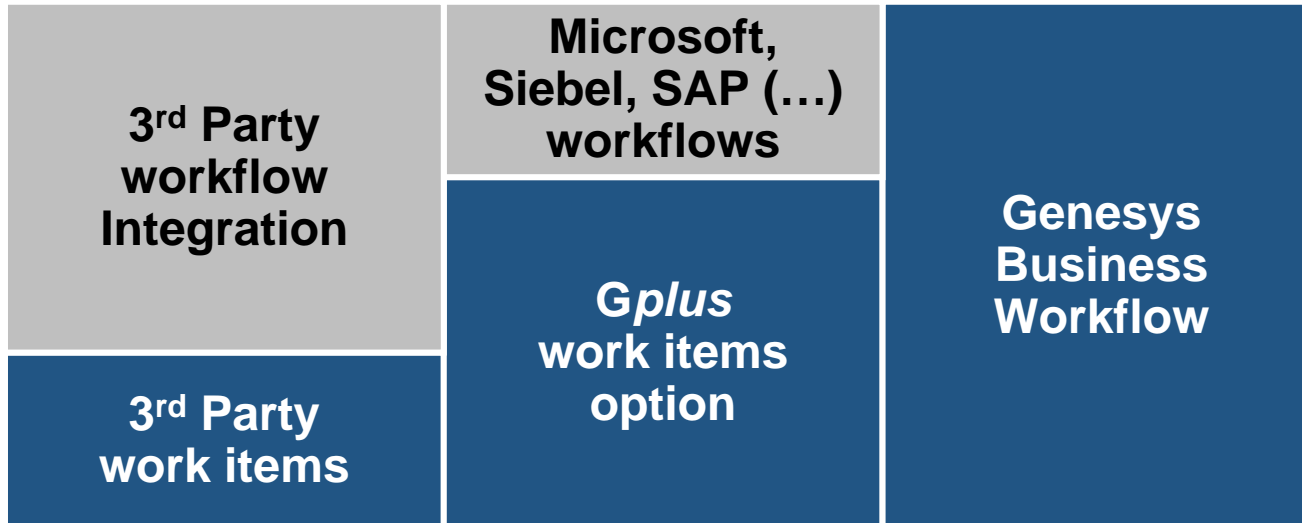
## ❖ Nortel and Microsoft

- Innovative Communications Alliance
- Microsoft Customer Care Framework

## ❖ SOA Initiatives

- Nortel Application Center
- Siemens ProCenter/OpenScape and beyond

# Business Process Routing Family of Solutions



**CIM Platform**

*Custom  
integration*

*Prepackaged  
integration*

*Bundled  
Solution*

# 2006 Predictions: Data Center Models and Hosted and Multi-tenant Options

## ❖ Occurring together

- Typically very large organizations
  - ◆ Financial Services firms
  - ◆ Service Providers

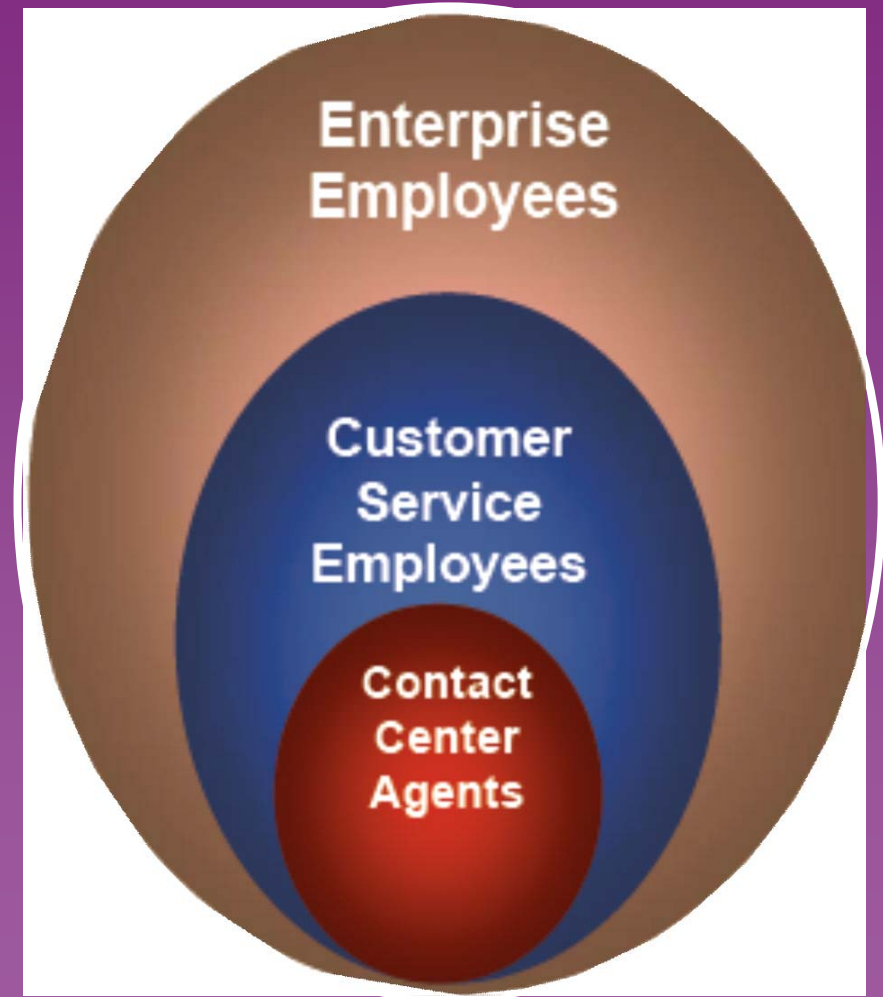
## ❖ Avaya on Demand

- Avaya or Partner Data Center
- Sprint Hosted Contact Center, powered by Avaya
  - ◆ Sprint's MPLS network connects a client's call centers and remote agents to a Sprint **data center** housing Avaya contact center applications

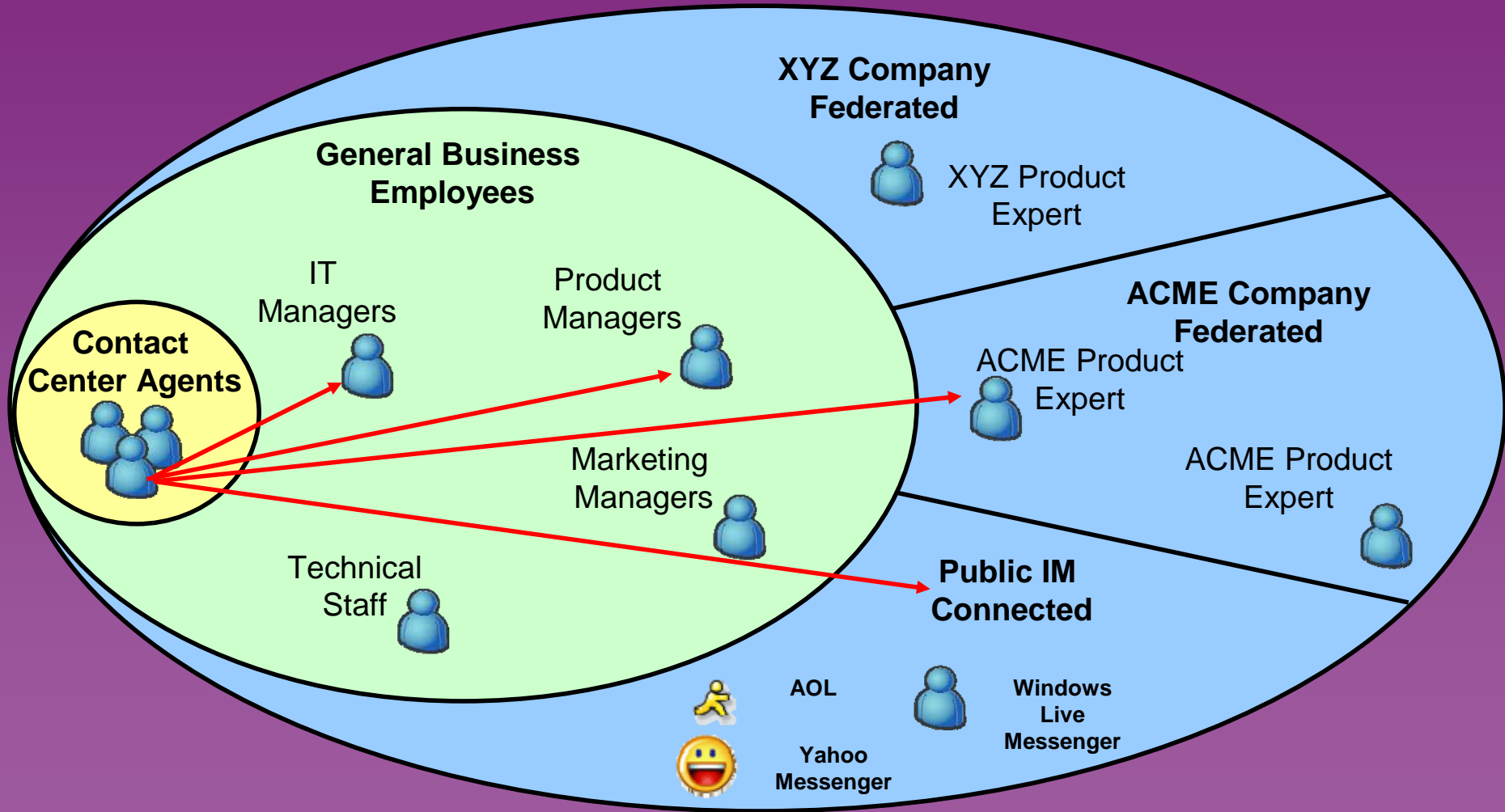
# 2007: Contact Center Not a Place, a State of Mind

## ❖ Organizational, Marketing, Product Changes

- Avaya Customer Service Application Division
- Cisco Customer Interaction Network
- Genesys Customer Service Chain



# Mitel Enterprise Presence & Chat Integration



# Mitel Enterprise Presence & Chat Integration

agm demo 3 - Contact Center Client

File View Tools Windows Help

Idle 00:23 Actions

Answer Hang up Trans / Conf Cancel Dial pad Account Code Volume Mute

1:40 8-SEP-2006 Phonebook

Redial Cancel Message

Contact Center Chat rogerVahHouten Online

Internal Company Experts

Call

Send an instant message

Clear alarms

Set alarms

Add / Remove devices

Properties

Print monitor

Set grid dimensions

Size grid to frame

Sort monitor

View

View

Windows

My Shoes Group

Queue Now

Queue Status

ACD

ACD

Connected to 192

Internal Company Experts

Long Wtg	Agts Avail	ACD	Idle	Non ACD	Out	Unavail	Offr	Hndl	Abn
0 00:00	1	0	1	0	0	0	0	0	0
0 00:00	14	13	1	3	1	11	191	160	31

Internal Company Experts

Internal Company Experts	Federated External Experts
Douglas	Julius
Terry Glenn	Extension 1474
Cory Dillon	Tom Brady
Extension 1404	Extension 1402
Terrell Owens	Extension 1464
Jamal Lewis	Extension 1482
Extension 1485	

# 2007: SIP Taking Over the World

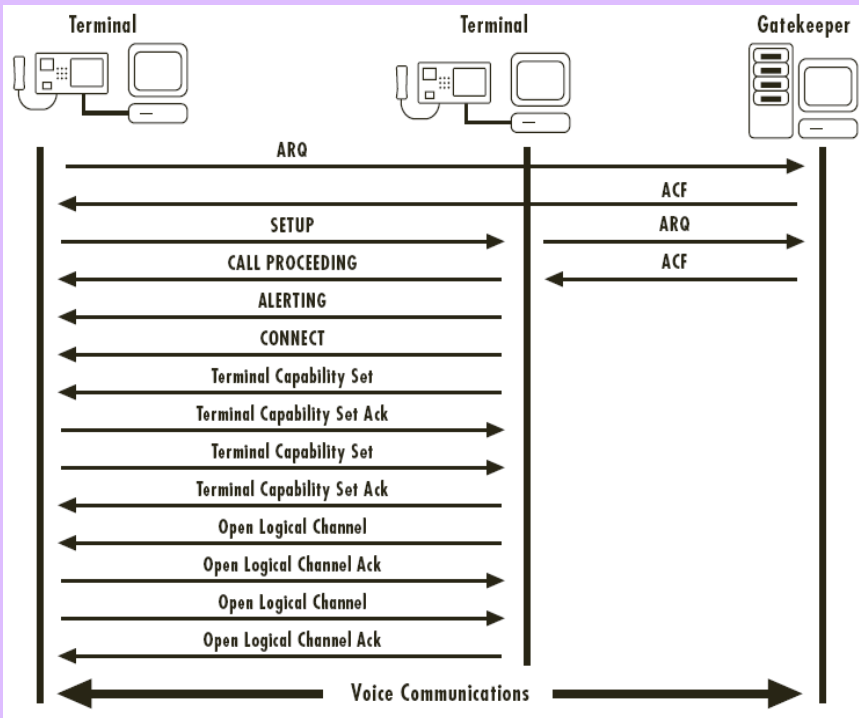
“The Session Initiation Protocol, having emerged from the Internet standards community within just the last few years, has been voted **the IP-based signaling protocol most likely to take over the world.**

SIP has already effectively squelched H.323, and is now going up against the proprietary call-control protocols of Cisco, Avaya, Nortel, Mitel, NEC and most other leading IP telephony vendors.

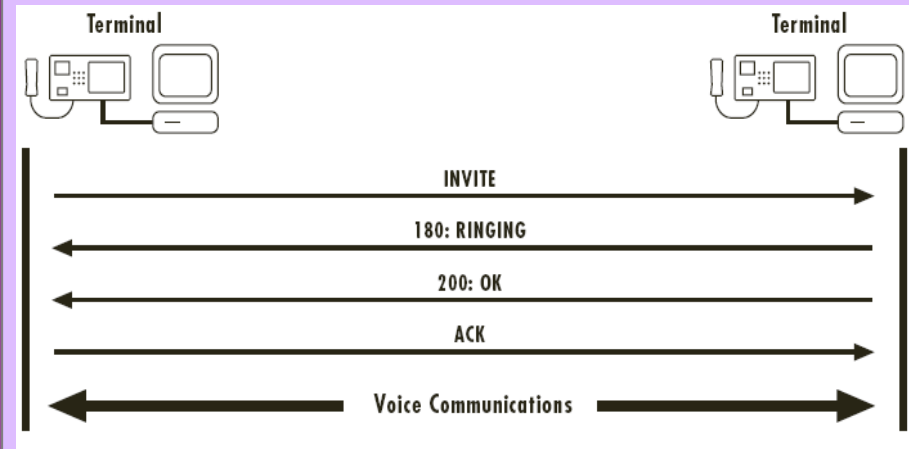
*Business Communications Review, July 2005*

# SIP versus H.323: Less Complex

## Basic Call Setup using H.323 Requires 16 messages



## Basic Call Setup Using SIP Requires 4 messages



# SIP versus H.323

Criteria	H.323	SIP
Complexity	<b>Very Complex</b>	<b>Simple</b>
Message Set	<b>Many Messages</b>	<b>Few Messages</b>
Extensibility	<b>Extensible</b>	<b>Very Extensible</b>
User Extendable	<b>ASN.1 – complex</b>	<b>Text Based – easy</b>
Elements that must maintain states	<b>Clients, Gatekeepers, MCU, Gateways</b>	<b>UA, some Proxy servers</b>
Processor Usage	<b>More Overhead</b>	<b>Less Overhead</b>
Telephony Features	<b>Robust</b>	<b>Robust</b>
Host Application	<b>Very Complex</b>	<b>Much Simpler</b>
Code Size	<b>Large</b>	<b>Small</b>
Dynamic Memory Usage	<b>Large</b>	<b>Small to medium</b>

# SIP and VXML: Bringing Self and Assisted Service Together

## ❖ SIP

- A request-response protocol that closely resembles HTTP
- Telephony becomes another web application and integrates easily into other Internet services

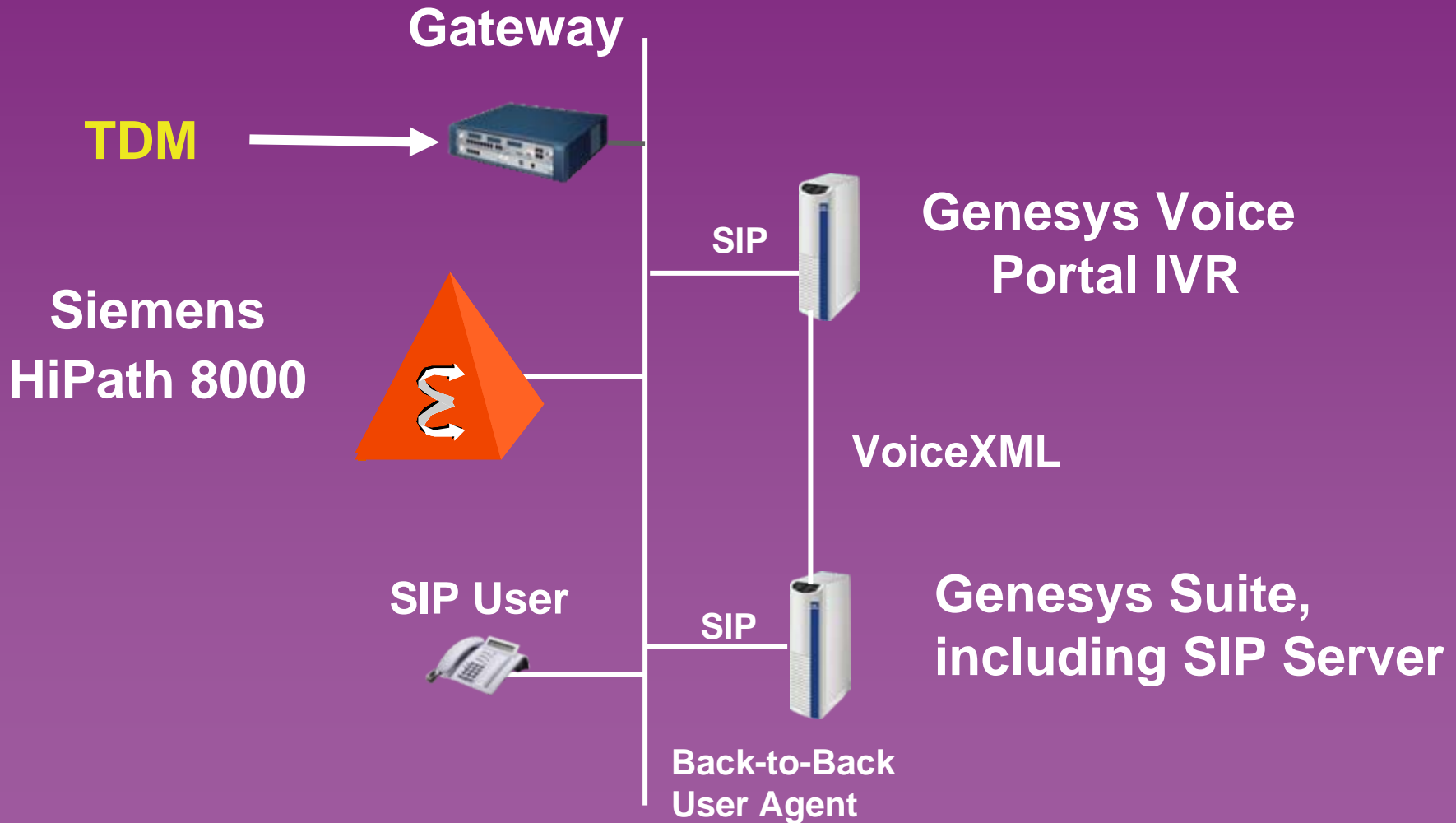
## ❖ VoiceXML

- Based on open web-based languages such as XML and HTML

## ❖ SIP & VoiceXML together familiar to programmers

## ❖ Service development time is much shorter using these open Internet standards

# SIP and VXML: Bringing Self and Assisted Service Together



# 2007: Increasing Number of SIP Options

## ❖ Initial forays

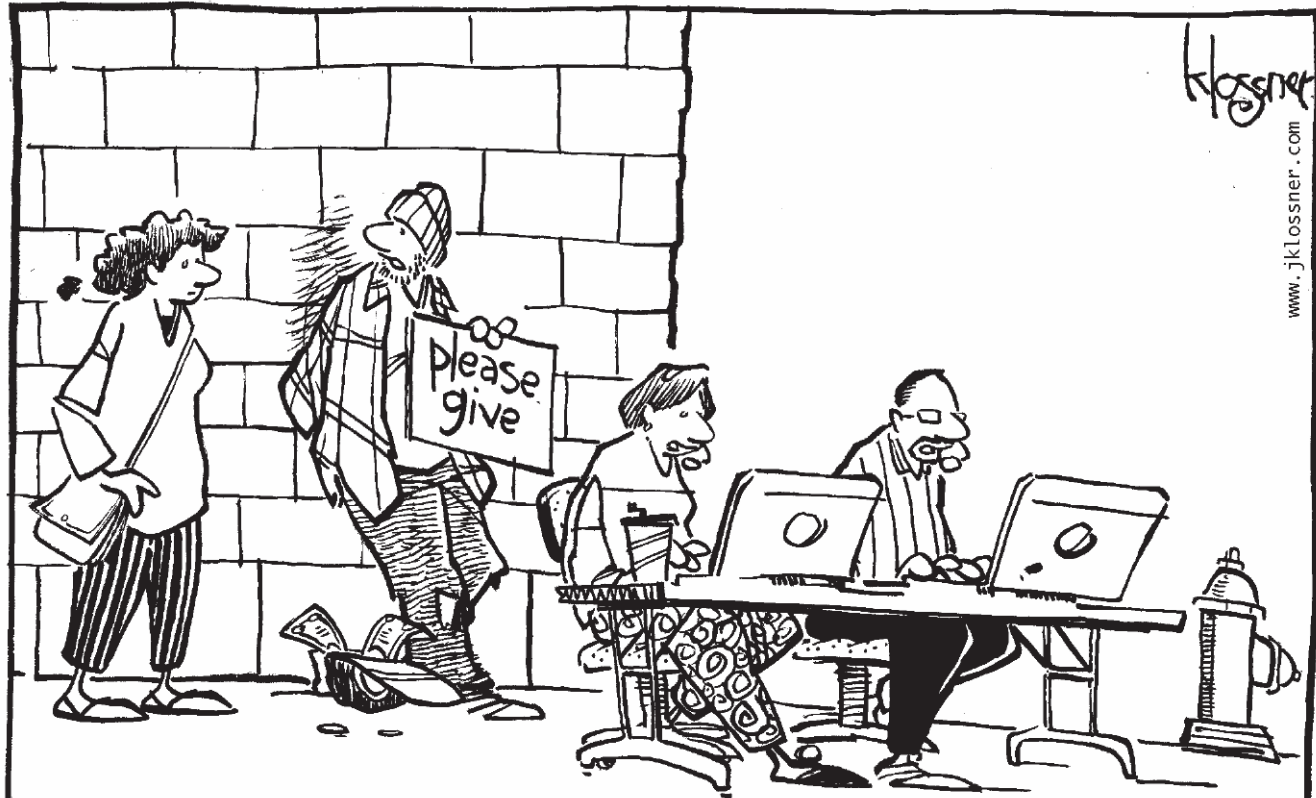
- SIP Agents and Trunks

## ❖ Early market entrants

- Genesys SIP Server
- Interactive Intelligence
- Interverse NuContact
- Nortel Contact Center 6.0
- Siemens ProCenter

## ❖ VoiceCon 2007 Announcement

- Avaya SIP Services for  
Interaction Center



www.jklossner.com

“Business has really picked up since we adopted SIP in our contact center.”

# IP Contact Centers: Who are the Players?

## ❖ TDM to IP shift has brought consolidation

- **Aspect Communications and Rockwell**
  - ◆ Roll-up with ~10 other companies into Aspect Software
- **Nuasis: Acquired by Intertec, an IVR company**
- **Telephony@Work: Acquired by Oracle**

## ❖ And Alliances

- **Nortel and Microsoft**
- **Aspect and Asterisk**

# IP-PBX Leaders also IP Contact Center Leaders?

❖ Strong PBX players tend to do well in IP contact center market

- Avaya
- Cisco
- Mitel
- NEC
- Nortel
- Siemens

❖ IP Contact Center Players *without* strong IP-PBX market share

- Aspect Software
- Genesys
- Interactive Intelligence
- Interveroice

# Avaya

## Strengths

- ❖ Scalability of solutions
  - Customer Interaction Express
- ❖ Breadth of product line
  - Avaya on Demand
- ❖ Financial stability

## Weaknesses

- ❖ Sometimes confusing array of solutions
- ❖ Still working to create unified administration, reporting and routing design across multiple components for large enterprise

# Nortel

## Strengths

- ❖ **Nortel Contact Center 6 rollout complete**
  - **SIP**
  - **Outbound**
  - **Multi-channel Desktop**

## Weaknesses

- ❖ **Microsoft relationship impact on contact center unclear**
- ❖ **Nortel Application Center still largely conceptual**

# Cisco Systems

## Strengths

- ❖ **Unified Contact Center Express**
  - Continues to mature, adding sophisticated features like routing on least occupied agent
- ❖ **Cisco Voice Portal**
  - Benefiting from acquisition of Audium

## Weaknesses

- ❖ More than is true with other PBX market leaders, contact center solutions from other vendors chosen or existing solution unchanged

# Siemens Enterprise Communications

## Strengths

- ❖ **Unified suite of applications, grown over time from a single application base**
  - Voice
  - Multichannel
  - Preview and Progressive Outbound
  - Great agent desktop
  - Growing IVR features

## Weaknesses

- ❖ **Future corporate structure questions**
- ❖ **Voice Portal a work in progress**

# Genesys

## Strengths

- ❖ Multi-vendor connectivity
- ❖ Growing story as soft ACD on top of IP PBXs
  - Becoming core routing application, not just CTI
- ❖ Range of applications
  - Multichannel
  - Outbound
  - Workforce management
- ❖ SIP Server

## Weaknesses

- ❖ High end, PSO-intensive set of solutions

# The *New Aspect* Software

## Strengths

- ❖ Relationship with Asterisk for PBX functionality
- ❖ Added quality monitoring solution

## Weaknesses

- ❖ Broad mix of in some cases redundant solutions

# Interactive Intelligence

## Strengths

- ❖ Recent SIP architectural enhancements with Media Server allow for greater scalability

## Weaknesses

- ❖ While financially healthy, lacks the size and scale of most of its competitors

# Intervoice

## Strengths

- ❖ NuContact designed from the ground up as an IP solution

## Weaknesses

- ❖ Challenge to integrate self and assisted service company assets
- ❖ Traditional Intervoice customers have existing contact center solutions

# What is on the Horizon?

- ❖ **Presence-based contact routing**
- ❖ **Composite Applications**
- ❖ **Video in Contact Centers**
- ❖ **Open Source Contact Center Software**