



**CASE
STUDY**

The Altman Group Achieves World-class Reliability and Productivity and Provides Superior Customer Service with Intelligent Communications Solutions from Avaya

Challenge	Solution
<p>Create a state-of-the-art contact center that empowers a rapidly-growing proxy solicitation firm to strategize and implement segmented campaigns that are highly customized to individual client specifications, extremely cost-effective within a competitive environment, and guaranteed to meet critical deadlines.</p>	<p>The robust capabilities of Avaya Communication Manager combined with Avaya Proactive Contact, the world's most accurate predictive dialer with advanced features such as Call Analysis and Cruise Control. Also: NICE Recording and Call Monitoring System; Avaya S8720 Servers; Avaya INTUITY™ AUDIX® Voice Messaging; and Avaya 2400 Series Digital Telephones. Supported by Avaya Consulting and Integration Services and an Avaya Maintenance Agreement.</p>
Value Created	
<ul style="list-style-type: none"> • Outgoing campaigns delivered more quickly and efficiently • Productivity increases ranging from 30 to 50% • Cost efficiencies achieved through streamlining supervisory functions and better utilization of staff • Revenues increased via capabilities to deliver all client needs no matter how custom or complex • Competitive advantage enhanced through better quality and pricing • Management relieved of operational concerns caused by downtime and other system limitations • Agents motivated by close supervisory training and attention 	

LYNDHURST, New Jersey - The Altman Group needed to expand and upgrade its contact center technology to equip its rapidly growing team of proxy solicitation agents, supervisors, and account executives to meet the current and future needs of their expanding client base. They wanted a solution that would provide them with optimum reliability, enhanced productivity, and the flexibility to manage their outbound calling campaigns more strategically.

Their clients are public companies and mutual funds that require shareholder votes for their annual meetings and special shareholder meetings. Traditionally, ballots were returned by mail and telephone campaigns were targeted at getting shareholders to send in their ballots; but approximately seven years ago the brokerage community began to allow shareholders to vote over the telephone.

Addressing Competitive Pressures with Strategic Planning and Efficient Implementation

“Since the emergence of shareholder voting by telephone, the importance of companies such as Altman Group has increased, but so have the competitive pressures,” stated

Joe Caruso, CIO. *“My colleagues and I have to be able to go to our clients with a high level of confidence that we can deliver a vote in the time required. This means we need a totally reliable, high-performance calling system with the broadest possible range of options to meet the specialized needs of our individual clients.”*

Altman Group goes into action for a client when the board of directors requires shareholder votes for any of a wide number of significant business issues. For a corporation, the issues could be mergers, stock splits, executive incentive plans, or other issues; for a mutual fund it could be an issue such as increasing fees or changing investments. There are a number of different mechanisms for obtaining the votes, but telephone solicitation plays a major role.

Their approach for delivering votes on time and cost-effectively is to strategize each campaign via subcampaigns that are segmented and targeted at different voter groups. Three key factors were required to optimize this strategic approach:

- An extremely flexible outbound dialing system that allows management to assign different groups of agents to different voters at different times of the day or night. Campaigns often need to be organized in extremely fine detail.
- A robust reporting capability that enables the company to evaluate the performance of their agents so that determinations can be made about their capabilities and their potential for obtaining votes from key target groups. These performance evaluations also enable supervisors to counsel agents on improving their performance.
- Assured reliability, to keep them fully operational at all times in order to maximize agent productivity during critical calling hours.

In terms of specific operational goals, they wanted to reduce costs by minimizing downtime and streamlining the supervisors' administrative tasks so they had more time for counseling and developing staff. They targeted higher productivity rates so they could meet tight timelines for their clients with fewer agents. They also sought a sophisticated reporting functionality that would enable them to optimize their business processes and make real-time adjustments quickly as needed.

Advanced Capabilities for Strategic Handling of Complex Campaigns

Working with Avaya and their business partner, Altura Communication Solutions, Altman Group created a new contact center based on the advanced capabilities of Avaya Communication Manager, Avaya Proactive Contact, and a NICE Recording and Quality Monitoring solution.

Avaya Communication Manager was selected because of its proven ability to provide continuous, reliable, and secure operations for mission-critical applications. It establishes a strong communications platform for Altman Group's current business needs, along with the foundation for applying new technologies which can expand the options and service they offer to their customers. The company's most pressing need was for optimum reliability, and Communication Manager provides that through a multi-layered approach for high availability, survivability, and resiliency. It has a secure IP Telephony infrastructure plus simple security management.

Avaya Proactive Contact was selected to meet the demanding requirements of Altman Group's time-critical proxy campaigns. This sophisticated outbound communications solution is a suite of hardware and software that offers the world's most accurate predictive dialer,

call progress analysis tools, proactive health monitoring and management, unified administration, and robust dialing algorithms. The Proactive Contact solution was also customized by Avaya's business partner, Altura Communications, in order to more fully support the particular needs of Altman Group's business – in particular speed and ease for the agents through log-in, start-up, and pop-up enhancements; specially-engineered data retrieval; and refinements in call transitioning.

Rounding out the solution was a **NICE Call Recording and Monitoring System with a 288-channel Log** to capture all the outbound T-1's from the dialer. Every call going out and coming into the group is recorded. This gives them extensive query capabilities and reports, and — most importantly — a secure record of the yes/no vote per customer.

Better Business Results with Avaya Intelligent Communications

Altman Group is now equipped with a state-of-the-art contact center that currently serves about 200 agents and has the immediate growth capacity for up to 400 agents. Unique features offered by Proactive Contact have played an important role in the daily work experience of agents, supervisors, and management, making this a prime example of how Avaya Intelligent Communications create better business and a better user experience.

Productivity increases: Joe Caruso stated, "We have seen a huge increase in productivity, which is measured primarily by how many shareholders are reached each hour. The new system has the unique ability to connect our agents to more targets in our databases. It makes the connection without that 'call center pause' which would normally give people a chance to hang up. This means that we can reach more shareholders with fewer agents than we did with our old system."

This vitally important benefit directly impacts contact center productivity by delivering the highest number of live contacts. It is based on a feature of Proactive Contact known as **Enhanced Call Progress Analysis**, which helps deliver a maximum number of live connects to agents by accurately detecting live voice, autovoice, and busy signals with close to 100% accuracy. It also filters out nonproductive call attempts more accurately than other outbound dialing systems and reduces the per-call cost of reaching customers.

Large boost in call quality ratings: Altman Group has also seen a significant increase in their quality index, which is a

“Our Avaya contact center solution has proven to be extremely reliable, so we no longer get emergency calls day and night about system outages that create costly downtime. It has provided us with all the features that we need, including the ability to segment our target population strategically, ensure a high level of security for our clients’ data, and monitor our productivity and effectiveness closely through the robust reporting functions. With these advanced capabilities in place and running well, we are equipped to multiply our backend investment exponentially through client satisfaction.”

— Joe Caruso, CIO, The Altman Group

composite rating of all factors that contribute to excellence in an agent’s management of calls, including categories such as introduction, closing, information transmission, and general communications expertise. Since the Avaya solution was deployed, call rating has skyrocketed to a phenomenal average of 98-99 percent.

This has had a positive effect on their contact center staff, helping to create more job motivation/satisfaction and better retention, all of which ultimately helps to reduce the high cost of staff turnover.

Agent/supervisor satisfaction: Abe Borad, Senior Managing Director, believes the quality increase and the user satisfaction that goes with it are due in great part to a feature that is provided by the call pacing capabilities of **Cruise Control**, which ensures optimum control of service levels by automatically adjusting the call pacing, taking into account agent talk time, answer rate, number of agents available etc. With this feature, the supervisor does not need to continuously adjust call pacing.

“Cruise Control allows our supervisors to concentrate on their teams,” Borad explained. “They can focus on the quality of the work and personnel issues, instead of spending most of their time on operational issues. Supervisors are spending more time with their people. The agents themselves are able to focus more on their calls, and many of them are really starting to shine.”

A key element of success for Altman Group was the **Comprehensive Training** provided. The basic course enables supervisors to identify and utilize the robust functions of their supervisor workstations, and an advanced system supervisor training covers Health Manager, message files, message scripts and files, and functions accessible through System Telnet.

Enhancements to strategy and planning: Management at Altman Group has been relieved of most operational concerns previously caused by downtime and other system limitations. They now have the capacity to strategize campaigns to the most minute level of detail in order to deliver results on-time and cost-effectively. Thus, Altman Group experiences the benefits of Avaya Intelligent Communications at both strategic and tactical levels of their business.

Competitive advantage: The overall Avaya solution has provided Altman Group with all of the advanced capabilities it needs to offer superior customer service in an extremely competitive industry. They can deliver high-volume calling for even the most time-sensitive assignments, ensuring a high level of customer satisfaction with both their pricing and their performance. As an organization, they are enabled to grow to almost unlimited capacity because of the scalability, reliability, and flexibility of their new contact center operations.

For more information on how Avaya Intelligent Communications can take your enterprise from where it is to where it needs to be, contact your Avaya Client Executive or a member of the Avaya Authorized BusinessPartner program, or access other collaterals by clicking on **Resource Type** under **“Do Your Research”** at www.avaya.com.

ABOUT ALTMAN GROUP

Founded in 1995, The Altman Group is a respected proxy solicitation and corporate governance consulting company that won the coveted TOPS award for highest-rated proxy solicitation firm two years in a row. They offer customized services that leverage the latest communications technology to deploy time-critical phone voting campaigns and to provide sophisticated reporting for their clients.

ABOUT AVAYA

Avaya delivers Intelligent Communications solutions that help companies transform their businesses to achieve marketplace advantage. More than 1 million businesses worldwide, including more than 90 percent of the FORTUNE 500®, use Avaya solutions for IP Telephony, Unified Communications, Contact Centers and Communications Enabled Business Processes. Avaya Global Services provides comprehensive service and support for companies, small to large.

For more information visit the Avaya Web site: <http://www.avaya.com>.

Applications	Services
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All statements in this Case Study were made by Joe Caruso, CIO, The Altman Group, and Abe Borad, Senior Managing Director, The Altman Group.

