

## Case Study

# Customer Direct

### CUSTOMER PROFILE

Customer Direct has been developing and enhancing Customer Interaction Software and Contact Center Services for the hospitality, e-commerce and subscription service industries for over 20 years.

### WEBSITE

[www.customerdirect.com](http://www.customerdirect.com)

### NICE CXone SOLUTIONS

- CXone Omnichannel Routing
- CXone Chat
- CXone Email
- CXone APIs

### RESULTS ACHIEVED

- 50% reduction in monthly training costs
- 15% improvement in monthly agent retention rate
- 5% increase in quality assurance performance
- Automated report creation and reduced the time supervisors spent compiling reports by two hours each week
- Decreased talk time
- Increased agent engagement

### ON THE NICE SOLUTION

“With CXone and the cloud, we implemented a work-from-home model which improved our monthly agent retention rate by 15%. We’ve also reduced our monthly training costs by 50% because we don’t need to constantly train new hires.”

Dale McManness  
Chief Operating Officer  
Customer Direct



## Customer Direct Boosts Customer Experience and Agent Retention with NICE CXone

### ABOUT CUSTOMER DIRECT

Customer Direct is a business process outsourcer (BPO) providing multichannel, multilingual live agent services including reservations, customer care and technical support. Its customer base includes leading companies throughout the U.S. and around the world in the hospitality, publishing, healthcare, IT and e-commerce industries.

The company has facilities in St. Louis, MO and Queretaro, Mexico. One hundred twenty-five full-time agents provide 24x7x365 support for phone, email and chat interactions. Agents service a wide variety of queries including making hotel reservations, answering product questions and managing subscription services.

### THE CHALLENGE

Customer Direct is keenly focused on delivering an outstanding customer experience but its on-premises Toshiba system was holding it back.

“We knew we couldn’t achieve the goals we had set for ourselves if we didn’t make some substantial changes from a contact center platform standpoint,” says Dale McManness, Chief Operating Officer.

Customer Direct was aggressively looking to launch a work-from-home model, which the on-premises Toshiba system couldn’t support. “When unemployment was low, we had trouble finding agents that lived near our Missouri headquarters,” says Dale. “We realized we needed the ability to hire talented agents that were based anywhere and our on-premises system wasn’t going to support the remote work model this required.”

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“Toshiba also wasn’t an omnichannel solution,” says Dale. “Our agents bounced between it and separate chat and email platforms. Utilization was subpar because they had to manually move between the channel solutions at a moment’s notice based on volume fluctuations. Labor is the number one expense for a BPO, so the poor utilization rates negatively impacted our business results.”

The constant switching between systems was also frustrating for agents. “They have the hardest job in the organization,” says Dale. “Constantly trying to catch up by signing in and out of multiple platforms is annoying, inefficient and contributes to attrition. We were already having a difficult time hiring employees so we wanted to minimize anything that made their jobs even harder and increased turnover.”

One of Dale’s long-term goals was eliminating the management of on-premises hardware. “There was the possibility that Toshiba could support our growth, but it was at a high cost. We knew a cloud solution would eliminate that requirement, so we started looking for a unified contact center solution that ran in the cloud.”

### THE SOLUTION

To start the search, Customer Direct submitted an RFP to several providers including NICE CXone. “We narrowed the candidates down to three finalists. We started digging into all aspects of the applications and ultimately decided to go with NICE CXone,” explains Dale.

It was key to choose a platform that improved the agent experience. Dale wanted a true omnichannel platform that eliminated the need for agents to log into separate third-party solutions. “We wanted to boost agent engagement and CXone does that with its intuitive interface and unified omnichannel functionality.”

In fact, CXone stood out among other vendors when it came to omnichannel. “During the evaluation process, other vendors said they were omnichannel, but they really weren’t,” says Dale. “Our agents would still need to log out of chat, for

instance, to go into email. That wasn’t what I was looking for. The seamless, unified agent experience across interaction channels positioned CXone at the top of the list.”

CXone’s APIs and custom reporting also stood out. “From a custom reporting standpoint, CXone is leaps ahead of other vendors’ platforms. And the APIs were also better because they gave us the ability to easily feed CXone’s data into Happitu, our platform for agent enablement, ticketing and reporting.”

### OPPORTUNITIES IDENTIFIED

#### Training costs fall 50% and agent retention improves 15%

Transitioning to a cloud solution meant Customer Direct could finally implement a work-from-home model to motivate employees and help it hire talented agents who didn’t live in the immediate area around their headquarters.

“With CXone, we could implement a work-from-home model which improved our monthly retention rate by 15%. Since we spend most of our money on labor, that’s huge. We also reduced our monthly training costs by 50% because we aren’t constantly teaching new hires.”

Dale continues: “Another by-product of moving to a work-from-home model with increased retention rates is that we could start executing improvements across the organization. When you have more tenured agents, the quality of service improves.”

“Our quality assurance scores increased 5%, and our clients are happy because everyone’s providing great service. Talk times also went down, because the agents are more experienced and comfortable. They know the business really well.”

#### Custom reporting gives clients visibility into specific metrics

It’s important to Customer Direct that its clients have visibility into important performance metrics, ticket data and phone data. “Our clients can see

their interaction volumes, how many calls we’re handling for them by day or hour, service levels and our average speed to answer. We also give them all kinds of business analytics so they can dig deeper into the data. This type of visibility helps us build stronger relationships,” says Dale.

He continues: “Our clients sometimes want to know, for example, how many customers chose option one compared to option two in the CXone IVR. Or how many received a ‘We’re closed’ message outside business hours. With CXone, we can easily provide that IVR-based reporting which is tremendous.”

#### “One of the best custom reporting solutions”

Dale says CXone’s custom reporting is by far one of the best. “We can easily get any data that’s being collected in the ACD. With other solutions, we’d need to access other platforms to get the data.”

Dale emphasizes that he wants supervisors to spend more time coaching—not collecting data. CXone helped him meet that goal by making it easy for managers to create reports.

“With our old system, our supervisors were spending a couple of hours each week pulling scorecard data. With CXone, we automated that process using the CXone APIs. Now supervisors just run a single report instead of collating data and manually inputting it into a scorecard. That improvement alone saves each of them around two hours every week.”

Agents can also review their scorecard results at any time using an internal system developed by Customer Direct that pulls data from CXone using CXone APIs. “They don’t need to ask their supervisor; they can just run their scorecard in our tool and immediately see how they performed today, yesterday or last week.”

#### Ensuring high service levels by setting priority levels

As a BPO, Customer Direct needs the ability to set priority levels on skills to assure high service levels—for any client, regardless of contact volumes. “Let’s say a client receives two calls in

## About NICE

With NICE (Nasdaq: NICE), it’s never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world’s #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center—and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.

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one day. If we miss one of them, then we’re at a 50% service level, which isn’t good,” says Dale.

Using the CXone IVR to answer calls lets Dale ensure that smaller clients with very low and hard-to-predict call volumes still receive an outstanding level of support and their SLAs are consistently fulfilled.

Dale says Customer Direct has realized a positive financial return on CXone. He explains: “CXone makes us more efficient so we can provide better service levels and higher quality to our customers. We’ve also improved the agent experience and retention by implementing an easy-to-use system and supporting a work-from-home model. We’ve seen the difference—both our customers and agents are happy.”