How BNSF Logistics Achieved Quick Wins with their Call Reporting Solution

By Holly Roberts, Systems Administrator, BNSF Logistics

BNSF LOGISTICS

Industry:

Third Party Logistics

Location:

Flower Mound, TX

Year Founded:

2002

Services Offered:

Air, Customs House Brokerage, Engineering, Intermodal, Managed Transportation, Ocean, Over the Road, Project Cargo, Rail/Transload, Reverse Logistics, Solutions Consulting

INTRODUCTION

This is a case study about BNSF Logistics and our search for the right Call Accounting and Reporting solution to meet our needs. I'll discuss some of the challenges we were facing with our previous software, and some of the things that prompted us to search for a replacement.

I'll also cover some of the requirements and criteria that we had for that new product...some of the things that we absolutely had to see, and some of the things that we really wanted to see, which led us to find Calero's VeraSMART product. I'll discuss the implementation process of Calero in our environment. And finally, I'll review some of the key actionable insights that we were able to gain within the first few weeks of implementation.

BACKGROUND

To give you some context on what prompted our search for a new solution, it's best to start by explaining what our previous environment was like. At a high level, our previous product was no longer meeting our needs, it was running on outdated hardware that had become unstable, and it was producing unreliable data. It was also chosen at a time in our organization's history where we were much smaller and we had fewer operational teams

and offices. Those were all staffed and operated in a similar manner, and so our needs were relatively basic.

We really only cared about seeing our total inbound calls and outbound calls, and really that's all that that product provided. It had also been chosen when cost was a major roadblock for applications and initiatives that weren't being business critical, and we really lacked the resources to maintain its infrastructure. As that product aged, and as the hardware it was running on aged, we started encountering regular issues with stability. And since we were no longer in a support contract, we had little recourse to permanently address these issues.

The way that our previous software handled the call processing would create significantly inflated or significantly deflated numbers every time we experienced one of these crashes of the software. Sometimes the reports wouldn't generate at all, so as you can imagine, that rendered those reports essentially useless.

As our needs changed and as we grew, we diversified our service offerings and we outgrew our previous product's capabilities. We had developed specialized functional teams across various departments, all of whom handled different aspects of our business, and who had

"Access to all of this data and such great detail has really enabled our decision makers to have a better understanding of what's happening on the phones within their teams, and start driving factors of operational efficiency like more staffing or dedicated resources for certain accounts."

different SLAs for different departments and customers. Our managers had started to request reports that could provide a more cradle-to-grave type view of their teams' phone activity and behaviors, so that they would be able to make more informed decisions about their teams.

Some of our managers were still interested in seeing the totals of inbound and outbound calls, but others had requested the ability to report on things like missed call averages, ring and hold times, transfer times, hunt group activity, etc. We wanted to be able to report on those metrics in finer detail, like specific times of day, or specific geographies of calls.

So we were already in a position where we were looking at a major upgrade that would be costly in terms of both expense and time. Since our needs were no longer being met with that previous product, we decided to start the search for a replacement. We actually found Calero and our VeraSMART product through our telecoms consultant, Carousel Industries, after we had given them a list of the key components that we were looking for: a product that would give us access to more types of data, and could grow with us to provide that detailed reporting.

NEW SYSTEM REQUIREMENTS

We had just wrapped a major project to upgrade our phone system to Avaya Aura Communication Manager 7.1. Since that was a relatively new product release of that product, chief among our requirements was **PBX compatibility**. Past that, some of the things that we were looking for in a new solution were:

- **On Premise** We wanted to be able to manage that infrastructure and we wanted the ability to virtualize. But we wanted something where hardware requirements weren't a huge consideration.

- **Advanced Reporting** We obviously wanted something that was going to provide that rich and detailed reporting that our users were asking for.

- **Scalability** We didn't want to have to purchase dozens of features that weren't applicable to our immediate needs just so that we could have access to the basics. But we wanted something that we could easily grow with as we grew and as our needs changed again.

- **Automation** We wanted to keep the administration burden low in whichever product we chose, so we were looking for automation features. The previous solution that we had been using didn't have any of those features, so any time we made a change in our PBX as far as the name that an extension was assigned to, or the name of a trunk group, and things like that, we had to then duplicate those efforts in the call reporting system. So we were really looking for something that we could create scheduled exports of those types of records from our PBX to that software with little manual intervention on our part.

- **Customer Service** Through our search for a new solution, we had demonstrated several different products, and we had some less-than-stellar experiences with customer service in that process. That didn't give us a great deal of confidence, that if we ran into issues, we would be able to have them quickly and efficiently resolved. And given the situation that we had just come from, we really wanted to make sure we partnered with a vendor who took pride in their service, and would be able to ensure that our reports were working and that they were accurate.

CHOOSING VERASMART

So obviously, Calero checked all of those boxes, and I have to say, from the initial sales call with Calero, I was really impressed by the amount of knowledge. In my personal experience, sometimes salespeople may be absolute experts where their own product is concerned, but may not have that same level of expertise when it comes to a customer's specific environment or implementation.

But even Calero's sales staff were very knowledgeable with Avaya terminology. And they were able to definitively answer what their product could do in our environment, and what it could not do. And that remained true throughout the proof of concept phase.

IMPLEMENTATION

When we decided to move forward with that proof of concept, the implementation specialist that we worked with was extremely knowledgeable, not only of the VeraSMART product, but also of Avaya Site Administrator, which is what we use to administer our PBX. So that allowed the implementation process to go quickly and smoothly, which enabled us to really hit the ground running. Within just a day or two, we had started to implement many of those features and reports that our users had been requesting.

And of course, as users started to see the level of detail that was now available to them, they started to request their own access. It's easy to set up end users with access, and because the VeraSMART interfaces are all so intuitive and easy to navigate, our users had a very easy time exploring the tool and creating their own reports that they wanted to see for their specific teams' needs.

ADVANCED REPORTING

And then naturally, as our users gained access to those new levels of detail, their requests for more, more, more started pouring in. And as we were able to create these new reports like ring time analysis,

missed calls, hunt group activity, knowing how many times a call had been transferred, or how long a call was staying on hold...this gave managers and team leads new insight into their teams' phone habits and statistics. When we posted a load, for example, we were able to see the geographies that inbound calls were concentrated in, and we were able to direct our efforts to carriers in those areas.

Another thing that our users were excited about was the report format itself. We opt to use the email-to- web link to the report, and this allows users to click on that link, and be taken to a report that allows them to drill into various levels of detail on one report, all the way from an aggregate view of the team's total calls and average talk time to every inbound and outbound call that a specific employee has had throughout their work day.

This level of detail allowed our leaders to make more informed decisions about how to staff their teams, and how to effectively route calls to ensure the best coverage and fastest response time.

ACTIONABLE INSIGHTS

We're still learning everything that we can do with VeraSMART in our organization, but we've already had a few scores, like being able to simplify some team structures to reduce administration across the board. And we've been able to provide evidence that calls were or were not placed in a certain time frame when dealing with things like claim disputes.

OUR IMMEDIATE WIN I think the most notable and immediate win that we've had through using Calero's VeraSMART product so far is through a specific default report called Missed Calls by Time of Day. I found this report within a couple of weeks after implementing the proof of concept, when one of our managers came to me to talk about his concerns with his ability to cover phone calls in his office. This is one of our smaller operational offices, but they had experienced a recent uptick in business which had created a problem with

being able to cover all of the phone calls. Not necessarily a bad problem to have, but a problem nonetheless, and one that we had to address.

So the manager needed to insure that these business critical calls were being answered. First we designed and implemented a new call routing strategy, so that we could direct phone calls from key accounts to a dedicated person. This seemed to help some but it was hard to know exactly how effective it was without some data points. And that's where VeraSMART came into play. I realized that the Missed Calls by Time of Day report would show us an aggregate view of the team's performance metrics as far as how many calls were coming in, how many of those were being answered, and how many went unanswered, and it broke those down into percentages. And you can actually drill down into a different view to see what the metrics looked like for the time frame with a bar graph, and then it will actually break it down into every hour of the day.

So using that information, the manager was able to work with me to improve our strategy for those key accounts, and he actually used this information to justify the need for additional office staff. We compared the metrics of answered and unanswered calls from that dedicated group that we had created against the rest of the office, and determined that there was really no way to improve unless we had additional employees. I don't have a dollar figure on that but I know it certainly helped that office and now others to insure that loads are being covered, which is our primary revenue generating activity.

CALL SEARCH REPORT I want to show you some of the things that BNSF Logistics is actually using. Figure 1 below is a view of the default report called Call Search. When I referred to being able to prove or disprove that calls were being made for things like claims disputes, this is one of the searches that we

Figure 1: The Call Search Report helps us prove or disprove that calls were being made.

use. There are multiple fields that you can use to filter your report. You can choose the time frame that you're looking at, and/or the CDR source that you want to report on. You can drill down into minute details like call type, national/international, and local/long distance. You can drill down into the duration, so if we know that a call was between 2 and 5 minutes long we can filter for calls that meet that criteria. We can filter based on the exact extension that was used to place

the call or the number that was dialed. So the access to this level of detail and the fact that the fields are titled in a descriptive manner makes it easy for IT administrators like myself to quickly and easily generate reports on the fly.

REPORT OVERVIEW Figure 2 below is a current view of every report that we actually have scheduled. So as you can see we have dozens of reports, all for different

Figure 2: The Report Overview screen shows every report that we actually have scheduled.

offices and different functional teams. Some of these reports are just looking at aggregate totals of a team's inbound and outbound calls, some of these are looking at ring time analysis, some of these are looking at missed calls, some of these are looking at specific details for a specific employee. So having access to a wide array of reports has enabled us to be flexible and

meet the needs of each individual office and functional team, and what they need to see in their reports to make more informed decisions.

RING TIME ANALYSIS Figure 3 on the next page is a view of the Ring Time Analysis report that I mentioned earlier. This report is being used in some of our
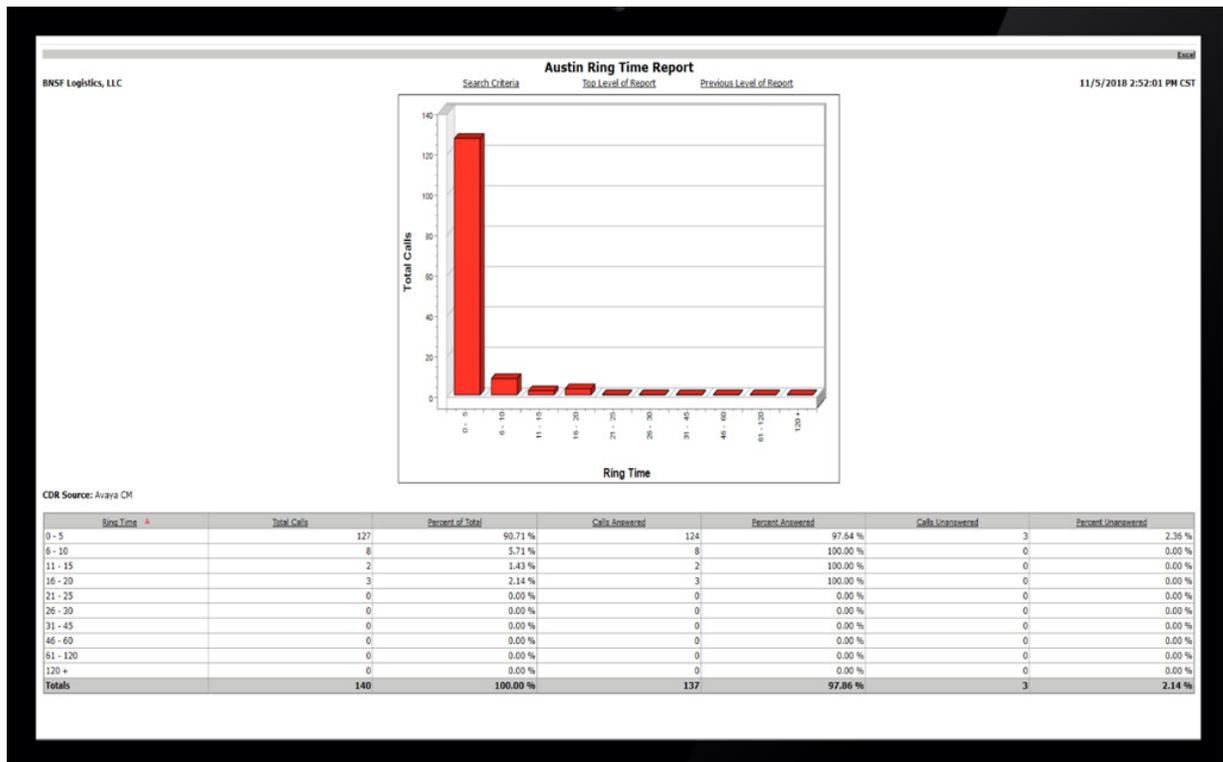
CALERO

Figure 3: The Ring Time Analysis Report helps us identify gaps in phone coverage.

smaller but busier offices, so that we can at a glance identify where gaps in coverage are, and start staffing and routing calls to insure that those are being covered so that we can improve response time and help drive customer service.

MISSED CALLS BY TIME OF DAY Figure 4 on the next page is the Missed Calls by Time of Day Report that I was referring to in my use case. As you can see, this is a bar graph that allows a manager to quickly and easily just take

a look at what's happening as far as answered and unanswered calls go, on a day's view. And then, go down further to break it down into each hour of the day.

And as I said, we used this specific report to learn that we needed to have more coverage around certain areas of the day to ensure that business critical calls weren't going unanswered.

Figure 4: The MIssed Calls By Time of Day Report quickly shows us when calls are not being answered.

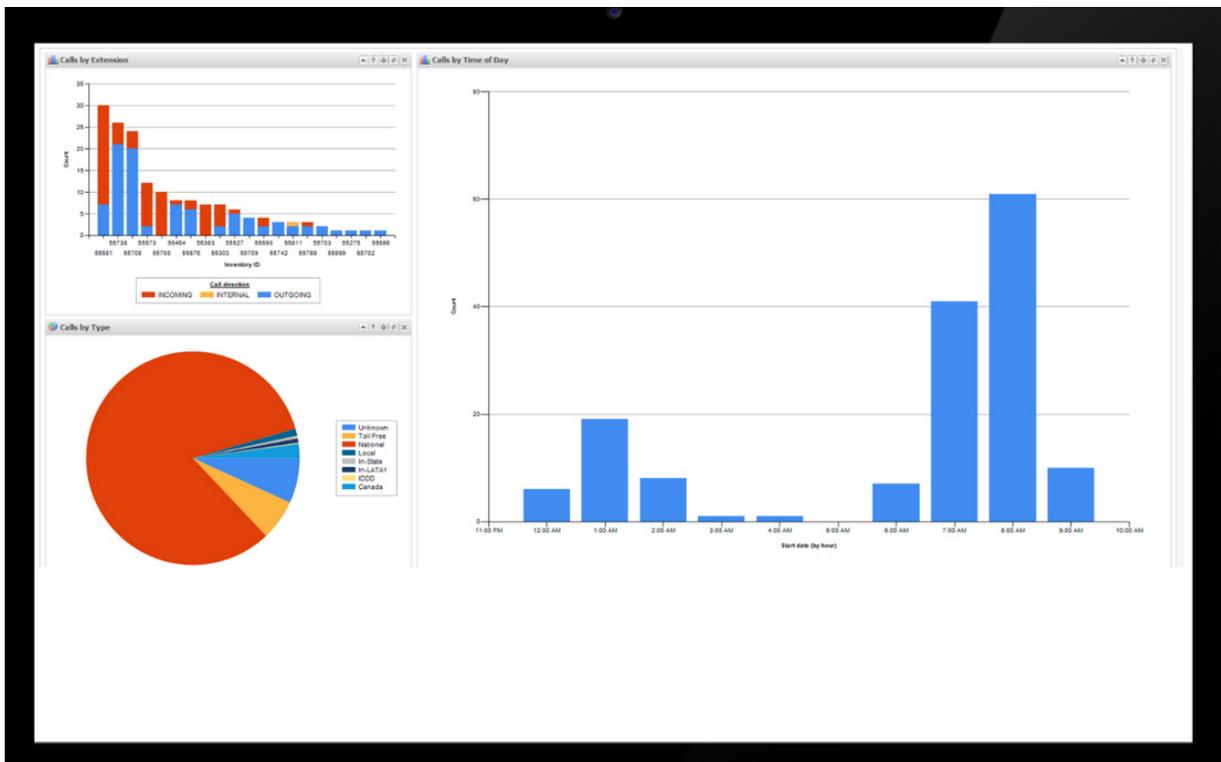Figure 5: InSight Analytics dashboards show our managers what's happening with their teams' phone behavior.

CALERO

INSIGHT ANALYTICS We're also using InSight Analytics, and Figure 5 on the previous page shows some of the dashboards that we're using. This feature has come in handy for team leads and managers of our busiest operational teams who also have the strictest SLAs. This allows our managers to log in to the VeraSMART application and, at a glance, see what's happening with their team and their team's phone behavior. And because these graphs are interactive, the manager can actually go in, and if they notice an anomaly, or if someone has way more calls than the next person, they can actually click down into these graphs, see exactly what's going on, and they can understand what's happening during these peak calling times. For employees that are getting an inordinate amount of calls, they can make staffing adjustments and phone routing adjustments on the fly, to ensure that is spread a little more evenly across their teams, which again drives improved customer service and response time.

Figure 6: The Call Summary by Extension Report provides rich CDR detail.

CALL SUMMARY BY EXTENSION Finally, Figure 6 above is the actual view of one of the reports that we are sending to our users. This was one of the things that our users were most thrilled with, as I mentioned, and you can see here the view labeled 1 at the top of the screen, that's going to show that aggregate view of a team's totals. It's going to show how many calls the team has for the day, the average duration, the total talk time.

If a manager wants to see more detail, from that same report they can actually down into that CDR source, and they can see each one of their team members listed out by extension where they can see how many calls that specific person was getting. And again those same metrics, average duration, talk time, types of calls, etc. And then in an instance where one employee is showing triple the numbers they might normally show on a given day, managers can drill down into that specific employee and see every detail about every single call that an employee has made within the work day.

CALERO

CONCLUSION

So again, I just want to drive home the fact that this access to all of this data and such great detail has really enabled our decision makers and team leaders to have a better understanding on what's happening on the phones within their teams and start driving factors of operational efficiency like more staffing or dedicated resources for certain accounts.

As I mentioned, we are still learning everything that we can do with VeraSMART. We're still exploring all that the solution has to offer, and I'm exciting for what we're going to see with that. These are just some of the key takeaways that we were able to gain within a couple of weeks of implementation.

ABOUT CALERO

Calero is a leading global provider of Communications and Cloud Lifecycle Management (CLM) solutions designed to turn communication data into actionable insight by simplifying the management of cloud, voice, mobile and other unified communications services and assets. With a deep commitment to innovation and customer service, Calero's CLM approach enables organizations to support the full communications lifecycle, from procurement to payment, including software and services that aid Telecom Expense Management (TEM), Managed Mobility Services (MMS) and Usage Management. Calero has thousands of customers in over 50 countries worldwide, including Fortune 2000 corporations, universities and government agencies. Calero is a portfolio company of Riverside Partners, a Boston-based private equity firm. Learn more at www. calero.com.