



# American Express Incentive Services (AEIS) Reaps Rewards with Echopass Call Center On-Demand

## Challenge

- Improve control and visibility of the entire call center operation
- Deliver flexibility to respond quickly and cost effectively to changing business needs, to add agents or capacity on short notice
- Provide integrated, single-vendor solution including scalable voice self service
- Reduce long distance costs between US and international locations

## Solution

- Replace current technology infrastructure
- Implement Echopass Hosted Call Center On-Demand

## Benefits

- Delivers rich reporting capabilities and management tools for more efficient operation
- Complete visibility and call routing throughout multi-site call center, creating one integrated system
- Able to quickly respond to changing conditions
- Scalable to handle current and anticipated future growth easily and cost effectively

## Results

- Reduced telco costs between Philippines and US call centers using VoIP
- Handle dramatic fluctuations in seasonal staffing requirements across multiple sites quickly and easily
- Improved workflow and customer service through comprehensive new reporting and management tools
- Ability to document meeting internal SLA for handling 85% of calls through IVR
- Scalable hosted infrastructure in place to meet anticipated doubling of operation within a year

## Technology Partners

- Genesys
- AT&T

## Background

American Express Incentive Services (AEIS) is a market leader of business to business prepaid products that offer reward solutions for corporate incentive and consumer promotions programs. AEIS clients use a wide selection of prepaid cards as well as American Express® Gift Cheques, Travelers Cheques, and Gift Cards for programs such as employee recognition, sales incentives, dealer/distributor incentives, loyalty initiatives, promotions, and rebates. AEIS was founded in 1997 as a joint venture between American Express and Maritz Inc. and does business with 76% of Fortune 100 companies.

INCENTIVE SERVICES



AEIS interacts with tens of thousands of cardholders each day handling questions about card balances, order status, or which stores and locations accept the cards. To manage these calls, AEIS set up a group of agents in distributed call centers in both the US and the Philippines. Agents receive inbound calls from existing cardholders in addition to performing some outbound account management and telemarketing calls to customers.

When developing the original plans to create its call centers, AEIS initially chose to leverage established facilities from its parents, American Express and Maritz. The Manila facility was owned and operated by outsourcer eTelecare on behalf of American Express. The St. Louis site had an existing Avaya Interactive Voice Response (IVR) that was owned and managed by Maritz. By late 2005, with significant growth projected in both cardholders and call volumes, AEIS realized the current infrastructure should be expanded to maintain a high quality customer service experience.

## Flexibility, Manageability, and Reporting Were Essential

The existing AEIS call center environment needed three important capabilities: the flexibility to adapt to changing needs in a timely manner, the manageability to operate efficiently, and comprehensive reporting to provide a clear view of the operation at all times.

Contact centers are environments that must be able to quickly respond to changing conditions. With their existing contact center, any change requests had to be routed through both American Express and Maritz. AEIS lacked control over how to develop applications, was unable to quickly modify IVR scripts, could not determine when applications would be deployed, and lacked the ability to add new agents within the individual contact centers. Even minor changes could be difficult. "In this structure, changes often proved to be both time consuming and expensive," says Mike Reeves, tech support specialist at AEIS.

Without control over the systems, agent productivity reports, a vital component for day-to-day management, were neither timely nor robust. Data regarding call volume was lacking as well. "Without a comprehensive reporting view," says Reeves, "it was nearly impossible to effectively manage or share resources across the centers." As a result, staffing was inefficient.

**"The Echopass reports provide call center folks with everything they need to manage the Manila contact center efficiently, and they offer every kind of report our people here in St. Louis need as well."**

—MIKE REEVES,  
Tech Support Specialist at AEIS



On Demand

Always On

Guaranteed

End to End

## A Better Solution

AEIS needed a better solution, one that provided flexibility to make changes quickly and cost effectively and scale the business on demand. What the company decided to pursue was an integrated solution that would:

- Deliver rich reporting capabilities for efficient management
- Leverage resources across the various groups and sites
- Reduce the cost of transferring calls between Manila and St. Louis

## Incentive for Improvement

In November 2005, to identify and implement the new solution, AEIS engaged Exogen, a division of Technology Solutions Group (TSC), a leading telco consulting firm based in Chicago that delivers specialized technology-enabled business solutions. A hosted solution was key, as AEIS wanted to avoid building the staff to manage an on-premise environment and needed the flexibility that a premise-based contact center infrastructure would not allow. TSC developed a contact center selection criteria matrix and evaluated a dozen companies offering hosted call and contact center services. The list of 12 vendors was quickly narrowed to four.

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—JOHN ROSE, AEIS Vice President of IT

One vendor, Echopass, clearly stood out from the other hosted contact center vendors under consideration in four areas. Echopass offered on-demand flexibility to make changes quickly and add or subtract agents in response to seasonal changes, allowing AEIS to scale during its busy season while paying only for what it needed. Echopass offered rich reporting capabilities for efficient management across the multiple AEIS call center sites—key for system wide visibility. Echopass delivered an integrated, end-to-end, “single-vendor” solution that was highly reliable and secure—meeting American Express’ stringent data security requirements.

And Echopass supported voice over IP (VoIP) connectivity between Manila and St. Louis, eliminating costly long distance charges. “These were key differentiators that the other three vendors could not provide,” say Cheryl Hoff and Bob Osgood from TSC. In addition, Echopass would be able to quickly deploy the solution for AEIS.

## On-Demand Flexibility

Call volumes to AEIS range from several hundred thousand calls per month during nine months of the year to nearly triple this amount during the busy last quarter. Echopass on-demand flexibility allows AEIS to quickly scale up its agent pool and seamlessly respond to change driven by seasonal requirements or other promotional programs. And because the Echopass solution is hosted on-demand, there is never any capital investment, equipment maintenance, or systems management headcount, which saves AEIS money on an ongoing basis and further improves ROI. In addition, with expectations of doubling the cardholder customer base within a year, Echopass has relieved the previous AEIS contact center growth and scalability concerns.

## Comprehensive Reporting Insures SLA Goals are Met

Before Echopass was implemented, AEIS was operating some of its sites in a vacuum with no feedback system to inform and update management. Today, in-depth, real-time reporting is making a world of difference for AEIS. The up-to-the-minute view of operations provided through Echopass’ real-time reporting allows AEIS to proactively manage its contact centers, rather than reacting to changing conditions after they’ve occurred. Historical reports from Echopass are automatically fed to a scheduling tool in Manila for maximum staffing efficiency. “The Echopass reports provide call center folks with everything they need to manage the Manila contact center efficiently, and they offer every kind of report our people here in St. Louis need as well,” says Reeves.

An important AEIS goal is to deliver a high level of customer service, which includes self-service IVR for cardholder issues that can be handled easily without agent intervention. Echopass enables AEIS to know that it is meeting its SLA goal of handling 85% of all calls through the IVR. Echopass “always-on” service also ensures that calls best handled by a live agent are being routed to the right personnel quickly and efficiently. “Echopass gives us 20/20 vision of what is happening at all times, in addition to helping us cut costs, providing high levels of customer service, and meeting our own SLAs,” says John Rose, AEIS vice president of IT.

## Data Secured and Audit Passed

As a large financial services organization, American Express is particularly sensitive to the security of its data systems. During the initial call center evaluation process, a 400-page security audit questionnaire had to be completed and approved to ensure that the Echopass data center in Salt Lake City (where its systems are hosted) provided adequate protection and security of sensitive customer information. AEIS executives also conducted a physical inspection and site visit of the Echopass data center to further learn about Echopass’ SAS70 certification and overall system capabilities.

“The audit can often be a year-long process that requires two or three passes,” says Bob Osgood with TSC. “That delay would have been a no-go for this whole project. No one had ever passed the audit on the first try, but Echopass did—and very quickly. This alone was very impressive.” As a result, AEIS was able to implement the solution rapidly and begin benefiting from Echopass’ always-on reliability, dramatically improved agent reporting, and comprehensive call center management capabilities.

## Exceptional Support

The smooth implementation in September 2006 has been followed by an exceptional ongoing level of support from Echopass. “Echopass personnel have been consistently accessible, extremely helpful, very fast to respond, and a pleasure to deal with,” says Reeves. “And whenever I need to call the Help Desk, I always get through right away. There’s always someone there—day or night. The performance of the Echopass technology and responsiveness of the Echopass staff have been just great.”