

Six Best Practices for Agent Knowledge Management



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Introduction

Implementing knowledge management in the contact center can have a profound effect on the quality and efficiency of your service operations. Customers benefit from interactions with more knowledgeable agents, who are empowered to resolve issues with greater speed, accuracy and consistency. Agent training costs can be substantially reduced, while job satisfaction can increase as interactions with customers become more positive.

Implementing knowledge management, however, requires careful planning. Success depends on an implementation with targeted goals and the development of knowledge that is closely aligned with service needs.

This paper provides a series of best practices to help you achieve outstanding results from your knowledge management implementation in the contact center. It summarizes the lessons Verint® and its customers have learned through many years of successful deployments and highlights the six best practices we have found are most crucial to success.

Here, you will find best practice guidelines for:

- Determining the objectives of your knowledge management implementation.
- Planning a successful implementation strategy.
- Designing a robust knowledge base.
- Developing useful content.
- Optimizing the agent's experience.
- Constantly improving knowledge.



Determine Objectives and Metrics

To set the goals for your knowledge management deployment, identify the areas that are most critical to your company's service operations and then determine the metrics against which the deployment will be measured.

Select metrics that will provide a comprehensive view of the business, akin to a balanced scorecard, such as daily operational metrics (reduced talk time, higher first contact resolution, reduced tier 2 escalations) and performance metrics (improved customer satisfaction, higher agent morale, lower agent turnover or faster time to competency for new hires.)

Your chosen goals and metrics will guide your knowledge management implementation. For example: If the goal is to increase first call resolution for tier 1 agents and reduce tier 2 escalations, deployment will focus on two areas. First, you will need to ensure that content is available at the tier 1 level to cover the majority of customer issues. Second, tier 1 agents will need research tools, including the most sophisticated search capabilities, such as natural language search with automatic recognition of query intent combined with guided resolution. These more advanced capabilities will help your tier 1 agents to more quickly and accurately identify the issue that needs to be addressed and select the best resolution for that issue.

Alternatively, if the goal is to reduce tier 1 call times, then consider limiting research techniques and the amount of content available to these agents. Rather than allowing tier 1 agents access to multiple search technologies and broad content, you may focus on more structured resolution techniques that require agents to follow a certain script or Line of Question (LOQ) path.

As you determine the goals and metrics, establish benchmarks so that you will know the true average for each metric before the knowledge management implementation.

Plan the Implementation Strategy

An effective implementation strategy requires:

- A well-rounded implementation team to champion the project and ensure the development of high-quality knowledge base content
- A realistic rollout plan that eliminates the risks of a "big bang" implementation approach

Developing a Strong Leadership Team

Knowledge management is much more than a technology implementation. It is a deep cultural transformation in people, processes and tools. As a result, the implementation requires strong leadership. Management will need to understand the relevance of knowledge management and how it contributes to business goals. Knowledge management must be viewed as part of the vision for optimizing the overall customer experience and empowering the support organization to achieve this vision.

Several organizational roles are critical to the success of a knowledge management team, including:

- Executive sponsorship – The transformational nature of knowledge management requires at least one executive who will champion the initiative and provide ongoing, visible leadership and corporate backing. Without this level of support, the initiative is unlikely to succeed.
- Knowledge management business owner – This contributor defines the overall experiences for the contact center (and, if applicable, future self-service) implementations, such as the user

interface, which knowledge retrieval aids will be available, and the level of personalization. (For later self-service implementations, the business owner should also coordinate communications to customers to promote self- service and drive adoption.)

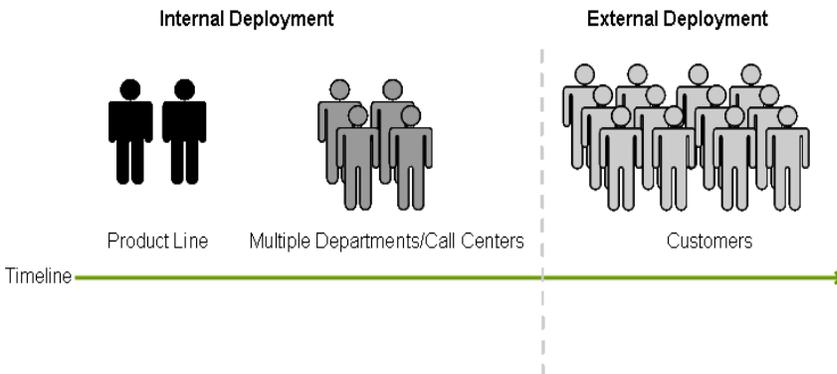
- Knowledge base owner – Knowledge base owners drive the creation and maintenance of content in the knowledge base by defining structure and types of content, content styles and standards as well as the process for knowledge creation. For example, knowledge base owners need to decide if there will be dedicated staff to create solution content or if content creation will be the collective responsibility of agents. They also coach the authoring team to help them become proficient. (In smaller organizations, this role is usually combined with the knowledge management business owner role.)
- Authors, reviewers, editors – These resources create and maintain knowledge. Make sure that you are adequately staffed for these functions. If agents will be key knowledge contributors, ensure that they have adequate wrap-up time to complete the submission of new content.
- IT – Technical specialists will be responsible for maintaining the systems used by the knowledge Management solution.

Planning a Phased Rollout

The experiences of Verint customers reinforce a rollout strategy that starts with deployment in the call or contact center, rather than customer self-service. By deploying internally first, you gain the opportunity to test and improve the usefulness and depth of solution content.

Once knowledge management has been fine-tuned in the contact center, it can then be deployed for customer self-service. Because the content and guidance methodologies have been improved and expanded upon through agent use, self-service customers will experience a more mature and robust implementation that can lead to higher rates of adoption and, ultimately, customer satisfaction.

As you plan a rollout strategy, avoid the “big bang” implementation. Start small by deciding which organization is most ready to benefit from and willing to implement knowledge management.



The experiences from the initial deployment can be used to improve subsequent rollouts and, in our experience, can result in cost savings that fund subsequent phases of deployment. For example:

- Implement knowledge management for one product line or geographic area. The success in this one department or product group will drive interest from other teams.
- Within your chosen target, focus use of knowledge management only for those service interactions that generate the largest number of calls or are the most costly, rather than trying to address every possible customer inquiry.



Design a Robust Knowledge Base

A robust knowledge base contains content that is appropriate to customer questions and can be easily traversed to find the best possible answer in the shortest amount of time. The knowledge base design plan should take into account:

- Guidelines and standards for content development that will aid the inquiry resolution process
- Content categorization (taxonomy) that logically organizes content and increases its “findability”
- Content life-cycle management to help ensure it can be created quickly and made available while maintaining content accuracy and validity

Developing Content Standards

Knowledge base content is different from content retained in other types of repositories, such as content management systems or file systems. Knowledge base content must be highly focused and developed with an awareness that it must be easy to find and use.

As a general rule, ease of use requires that content is written to answer a specific question in as few words as possible. Content usability should also take into consideration the user’s level of knowledge and experience. The more intimately you understand who will be using published knowledge, the more likely you will be able to produce content that delivers maximum benefit.

For example, content may need to be presented differently for novice and expert agents. Novices may be more successful with step-by-step instructions and photographs, while experts need just abbreviated explanations and reminders.

When establishing standards for content creation, keep the following in mind:

- Each piece of content should contain just one idea.
- The style should be simple and practical, with steps for resolution explained logically and concisely.
- Rather than providing exhaustive descriptions, content should be as short as possible and use a direct, informal tone.
- The content structure should be uniform and use a consistent vocabulary and taxonomy.

Content Templates

Templates can be very helpful for developing content with a high degree of findability and usability.

For example, consider creating a Troubleshooting template, a How-To template and an Information template, each of which contains predefined headers to guide the author in capturing all the needed information.

A good, standard template for writing content includes the following:

- The problem/question: What are customers trying to do? What are they asking? What was the customer experience that drove the question?
- The environment: product, model, revision level, etc. and what has been altered in the environment?
- What has been altered in the environment?

- The resolution: How to fix the problem (i.e., the answer to the question).
- The cause: The underlying reason(s) for the problem.

Defining a Taxonomy

An important aspect of developing a robust knowledge base is the definition of content categories, which should take place before creating content.

Content needs to be logically organized and generally presented in a tree structure, with the most general information at the higher level and specific product information at lower levels.

Categorization is important to increase the findability of content. For example, by categorizing content, users can then use more advanced search techniques, such as category or parametric search. Categorization is also what makes it possible for users to navigate a topic tree when searching.

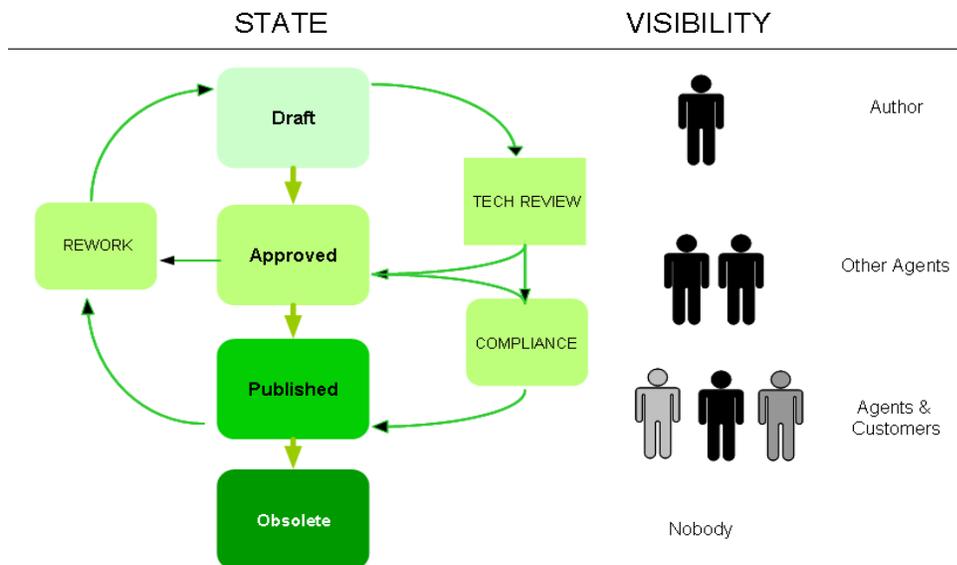
Establishing a Solutions Workflow

As part of the knowledge base planning process, determine how to manage the life cycle of solution content. This requires deciding who will be allowed to create content, as well as the content approval process that specifies which individuals and departments will be involved in review and approval.

Consider the following best practices when designing content workflow:

Minimize the number of steps in an approval process. This helps reduce the time lag between when content was created and when it is published, which is especially important for critical content that was initially omitted from the knowledge base.

Follow authoring standards, such as the Consortium for Service Innovation's Knowledge-Centered Support (KCS) workflow. KCS recommends streamlining the workflow process to ensure it does not contain arduous review loops. It also recommends that a solution is visible selectively, based on its position in the life cycle as well as the entitlements of each user.



As part of the workflow definition, define the process for content end of life and archiving based on such factors as usage, corporate policies and regulatory requirements.



KCS practices have shown that typically less than 20 percent of knowledge base content is reused. Hence, solution reuse is the best trigger for review. Using reporting, you can determine the use of each object over time by identifying content that is never used as well as pinpointing content most frequently used, to which special care and attention should be given.

As part of this process, review candidates for deletion to understand why the content is not being used. For example, is it outdated, or has it been created in such a way that it is hard to find?

Develop Useful Content

The goal of optimizing knowledge is to make sure that service-related content is targeted so that it will speed up the inquiry resolution process and increase the consistency of resolution.

No magic number exists as to how many solutions a knowledge base should contain. Too little information and coverage will be inadequate. With too much information, agents will waste time looking through large numbers of search results to find the right information.

The “right” size of a knowledge base is achieved when a balance exists between the quantity and quality of information in it. The key to optimizing knowledge is to consider:

- What is the most valuable knowledge to include?
- How can the content be made most effective?

Choosing the Right Content

You can determine which knowledge is most valuable by creating a task-driven view of knowledge and analyzing user demand for specific pieces of content, such as the content needed to support the common activity of opening of a new account.

One strategy for determining which content is most needed is to use the standard 80/20 rule. Identify the 20 percent of issues that are causing 80 percent of inquiry volume or the greatest customer dissatisfaction. Improving agent performance for this 20 percent will deliver the fastest ROI.

Another strategy is to look for inquiries that may not be the most common, but are at such a level of complexity that they typically result in high-cost interactions.

You can identify the most valuable content by mining call tracking and historical problem reports, operating procedures, external documents and other sources to identify the 20 percent of items that are reported most often, and for which the solution is the same each time. Agent focus groups can also be useful for identifying these common issues.

Once you have identified the right content, review it for accuracy, completeness, relevancy and ease of use.

Writing in the Language of Customers

Content needs to be written – or in the case of existing content, re-written – in a direct and informal style that speaks in the language of customers. What this means is that customers are most likely to talk in terms of symptoms, while the language used by agents is usually technical and presumes deep product knowledge.



For example, the customer will say, “My system is slow.” The agent will say, “There is a performance problem.” To bridge this gap, solutions should be written in the customer’s words with an extensive list of synonyms maintained to account for the diagnostic language of the agent.

In addition, many times, an industry, company or department will have a specific vocabulary that needs to be understood by the knowledge management solution. These key terms should be captured, either as synonyms or an industry-specific lexicon, so that they can be used in searches, thus making it easier to locate relevant information.

For example, a telecommunications company might need to add the following acronyms that are specific to the industry and company:

- MTSO – Mobile telephone switching office
- AAA – Authentication, authorization, accounting
- AAP – Add a phone
- CIBL – Credit imposed balance limit

Creating Titles that Enhance Recognition

Good solution content and powerful search tools are useless if users find it difficult to recognize appropriate solutions when they appear in search results. The common practice of presenting the main thought of the solution in the title presumes that users will recognize that solution as relevant when they see it. Unfortunately, this is often not the case. Failure to recognize good content when it appears produces two negative results:

- Investment in writing the content goes unrewarded and fails to contribute to the goals set for resolution.
- Additional effort and resources are wasted authoring new content to fill in knowledge gaps that do not actually exist.

Apply the practice of writing “in the language of the customer” to the titling of content as well. Consider what the agent knows about the situation. The title should focus on the primary symptom addressed by the solution instead of the solution itself. Alternatively, configure the user interface for search results to display matching symptoms or questions as results.

The goal is the same regardless of which method you choose – do everything possible to enable users to easily recognize when they have found relevant content.

Using Existing Content

In many cases, useful knowledge already exists in other systems, content repositories and databases. For each content item in other repositories, decide if you will index it in its existing location or re-author the content for inclusion in the knowledge base.

Indexing can be a good way to quickly provide agents with access to useful content through search.

However, in the long run, it is best to re-author the content that is related to the core 20 percent of service issues to ensure that content standards are met, and that the content is more readily available through the multiple information retrieval options that the knowledge management system provides.

When re-authoring content for inclusion in the knowledge base, break the information up into logical units or solutions, rather than simply including a long existing document as a single solution. This helps



eliminate the need for agents to search through lots of text for the particular content nugget that answers a customer's question. Links between related solutions can be added to help guide the agent to other relevant information.

By combining these two methods, less frequently used content is always available for search, while the core 20 percent of information is available through multiple information retrieval methodologies. In all cases, ensure that agents can conduct searches that span content inside and outside the knowledge base.

Optimize the User Experience

The user experience focuses on how agents find appropriate solutions most efficiently. This requires more than just standard search. Agents will benefit most from knowledge architecture that structures access to content through interactive guidance methodologies that are attuned to their level of skill, domain expertise or corporate requirements.

Ideally, the knowledge tool will offer the best methodology based on the issue that has been identified. For example, a basic question will result in a simple answer, while a symptom with many possible causes will lead the agent naturally into a guided resolution experience, resulting in the best answer.

Guidance methods can include simple and advanced search, browsing topic trees, following structured scripts, using clarifying questions, FAQs and Service Alerts. For each of these, keep in mind the guidelines listed in the next section.

Search

Expert agents who are familiar with terminology need a minimum of guidance and more frequently rely on search to quickly locate the best answer. To help these agents, provide all types of searching including keyword, natural language and Boolean. Search should be implemented as follows:

- Make search smart. Use automated learning built into the knowledge management solution to promote documents to the top of results lists based on use, or use experts to weight the most likely documents so that they appear first in a list.
- Use clarifying questions to refine search results, as these help agents quickly narrow large results lists. (See Clarifying Questions below.)
- Fine-tune search results by weighting sections within a solution document. If many solutions have similar titles, you can improve the accuracy of results lists by giving more weight to certain keywords attached to the document or particular content within it, rather than using just the title to determine relevancy to search parameters.
- Recognize misspellings and offer spelling corrections.
- Simplify repeated searching with aids, such as the ability to save searches, replay recent searches and automatically complete search entries as the user types (type ahead).
- Ensure that the synonym list is complete, including acronyms and industry terms. Key industry or corporate idioms must be part of the search criteria so that agents can include or exclude them to quickly refine results.
- Hide the relevance score. Relevancy ranking is somewhat misleading as it is hard to tell the difference between a 96 percent match and an 86 percent match. Instead, simply present users



with a list of solutions ordered by relevancy. How search results are displayed also needs consideration.

- Ensure that agents have enough real estate on the screen for results.
- Provide navigational aids, such as flyover (automatically generated) document summaries that eliminate the need to open all solutions to see content.
- Make it easy for agents to scroll through a list of search results using forward and backward buttons.
- Display solution metadata, such as the type of document (Adobe® PDF or Microsoft® Word document, for example), last modified date and the content's position in the topic tree.

Browsable Topic Tree

Novice users are often comfortable using familiar tree-folder structures to browse. Browsable topic trees should map to how users perceive your company's products or services. Ensure that the content is organized in the way that makes sense to users of the knowledge base.

Decision Trees and Line of Questions

The knowledge base development process should also include decisions about using resolution techniques beyond basic and advanced search. While these will require more upfront work to create, they will provide agents (and eventually customers) with alternative methods for finding solutions by offering guidance that helps them pinpoint the most appropriate answer.

Decision trees, also referred to as line of questions (LOQs) or scripts, are structured question paths that guide novices through a particular set of questions that branch dynamically based on the answer to each question. Scripting is very useful for complex diagnostics or when regulation requires agents to follow a precise process. It is also helpful where user input is needed to hone in on the correct solution, such as knowing the correct model number or type of operating system to troubleshoot an equipment failure.

Verint customers have found scripting particularly useful in these situations:

- Highly regulated environments (such as healthcare or telecommunications)
- Processes that have a high error rate
- Procedures where there are multiple if/then scenarios
- Procedures that are somewhat complex but not used often

Clarifying Questions

Clarifying questions are useful when a search returns a broad set of results. By answering specific questions, the initial results list can be refined and limited to the most relevant solutions. For example, searching on "streaks across page" might bring back 25 results. By presenting the user with clarifying questions that help refine the type of streaks, an organization can make it easier to find the right solution.

One Verint customer finds clarifying questions are best used when there are more than 10 solutions related to a primary topic. Using questions that allow the user to select a subcategory, results are filtered to present three or fewer most-likely solutions.



FAQ

Consider displaying the most frequently asked questions. This list should be automatically generated based on the most frequently accessed documents and should update dynamically.

Service Alerts

To make knowledge an integral part of agents' work life, push relevant, important content to the agent's desktop dynamically, such as policy changes, "must-reads," training assignments or emergency alerts. Agents should also be able to subscribe to content of interest.

Avoiding Decision Overload

As tempting as it may be to offer every available retrieval methodology to every user, pick two for any one experience, such as giving the user the choice to browse or enter a natural language query. Offer natural language or Boolean keyword search. Offer general troubleshooting LOQs up front while hiding those related to specific issues until sure (via search or browse) that a particular LOQ is relevant to the situation.

Constantly Improve Knowledge

Optimizing content is not a one-time activity. Once implemented, the health of the knowledge base must be constantly monitored with new content added, erroneous content adjusted and obsolete content removed on a regular and timely basis.

It is most important that content in the knowledge base reflects solutions that have been proven in the real world of front-line customer support. This can be achieved in two ways:

- Enabling agent and customer contribution to the knowledge base.
- Analyzing service data to determine content usage trends.

Agent Contribution

The most effective method for developing meaningful content is to fully integrate support agents in the knowledge creation and maintenance process. Empowering agents to contribute their expertise when it is required is particularly useful for filling in knowledge gaps, especially for those infrequent or low-value questions that you have deliberately chosen not to address in the initial implementation because they do not heavily impact customer satisfaction or costs.

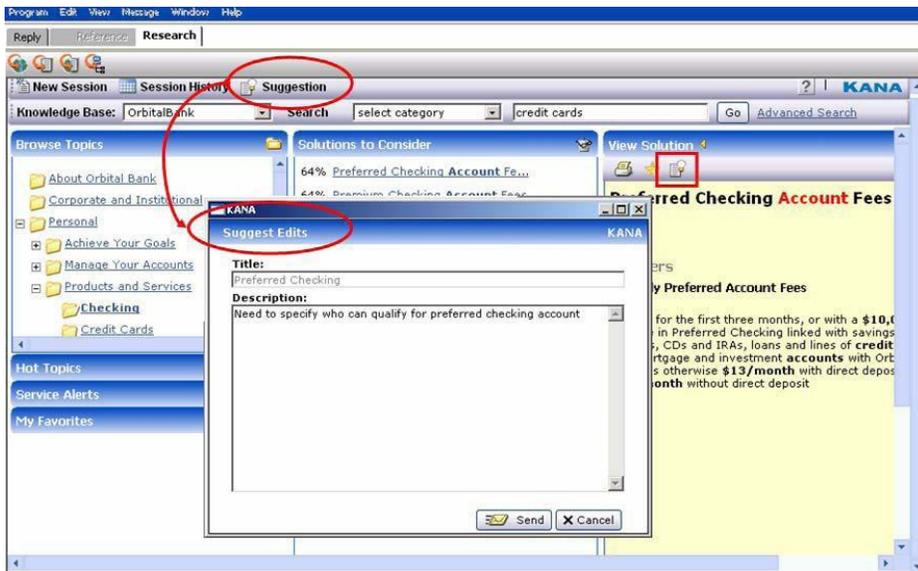
Many companies recognize that knowledge contribution needs to be an important part of the agent's job. The key is to make sure that agents can actively and efficiently contribute content without stepping outside their support role.

This is where models, such as KCS, can be highly effective at promoting agent contribution. KCS focuses on creating knowledge as a natural byproduct of the day-to-day interaction between agents and customers. Support organizations that deploy solutions developed with KCS principles do not need to predict or guess what content is important because content is created based on actual customer needs, which are validated over time as agents use and refine the solutions.

Agents should be able to contribute in multiple ways:

- They should be able to flag existing content for rework or suggest a new solution.
- They should be able to rate content for relevancy and provide feedback.

- Agents with authoring rights should be able to correct inaccurate content or to create new content to fill in knowledge gaps.
- Many agents should be allowed to contribute. Allowing only a segment of agents to author new content is certain to leave valuable information based on their experiences out of the knowledge base. A more inclusive method enables all agents to submit draft content using the authoring tools that are most convenient to them at the time of discovery. For example, if an agent is working on an email and perceives a knowledge gap, he should be able to highlight relevant content in the email and route it for inclusion in the knowledge base.
- Another way to empower agent contribution is to capture all pertinent information about the service interaction automatically, such as the session history information. Agents can link this information to existing content to quickly create a draft solution, which can then be revised by a designated reviewer or published immediately and revised as it is used by other agents.
- Close the content authoring loop between customers and agents with “just-in-time” authoring. If an agent is unable to find the right solution to a customer’s question, the agent can author a new solution on-the-fly to capture the customer’s point of view and vernacular. Rather than subject these solutions to an arduous review process, let them be reviewed and revised as they are reused by other agents. This focuses the agent’s energy on perfecting only the solutions that are used, and improves the quality of content as errors are corrected immediately.



Customer Contribution

With the advent of Web 2.0, customers now expect to have a voice – express an opinion, critique an answer, rate a vendor or solve another customer’s problem. Web 2.0 requires an expanded definition of knowledge management as not simply a process of providing answers from the company to the customer, but as a free-flow of information in all directions – company-to-customer, customer-to-company and customer-to-customer.

Expanding the knowledge management solution to an environment of “Knowledge Management 2.0” requires careful thought, as you must be sure the content in the solutions knowledge base is always accurate and up to date. The first decision to be made is whether or not you want to include customer and

external content in the knowledge base. If the answer is “Yes,” then several best practices should guide the implementation of customer contribution:

- Open the knowledge base to encourage dialog between customers, agents and authors with the aim of providing more relevant content. Append feedback forms to each knowledge base solution so that contributors can suggest changes that will bring the content in line with user demand.
- Integrate the knowledge base with discussion boards. Provide a means for anyone reading a posting in the collaborative realm to nominate a piece of content for review and promotion to the official knowledge base. We find that offering customers the ability to actively rate content and submissions encourages participation, leading to a sense of empowerment as contributing members of the community. The level of participation almost always increases dramatically when people see clear evidence that their contributions are being read and are making a difference.
- Allow users to rate the validity of content and contributors. Contributors with consistently high ratings can be afforded “expert” status so that they can add content without requiring official review.
- Augment content nominations and feedback with automation that classifies and prioritizes unapproved content so that every item does not have to be manually reviewed. This is particularly useful for avoiding the logjam that can result by having to constantly monitor and review forums and postings.
- While allowing customers to contribute, give more weight or preference to approved solutions in the knowledge base. Make sure that the ability to search the broader pool of potential solutions does not mask or confuse approved solutions with unapproved contributions. Use collaborative, unapproved information as a backup for when relevant or successful solutions cannot be found.
- Develop a “folksonomy.” Knowledge bases typically contain hierarchical content categories that a user navigates to find answers (the taxonomy). You can augment the company-generated taxonomy with an organically developed folksonomy, which is a collection of user-generated tags. Contributors can tag useful content, and the user community can then browse these tag clouds. These folksonomies do not preserve the relationship between objects as company taxonomy will, but they can more closely model how customers interact with knowledge that they find.

Using Service Analytics to Identify Solution Trends

The above techniques for continuous knowledge improvement should be combined with the use of service analytics to help identify solution usage trends and determine where gaps in knowledge exist. The types of analysis that can positively impact service effectiveness include:

- Solution use over time – Tracking the use of knowledge objects over time can identify solutions that are rarely used and are candidates for deletion to streamline searching and content maintenance. Prune this unused content from the knowledge base. This analysis will also pinpoint the most frequently used content, to which special care and attention should be given. An extra review of this content before it is promoted to being customer-visible is a good practice. This helps streamline the content in the knowledge base and ensure that it is relevant and accurate.
- Search terms used – By analyzing search terms used by customers and how these terms are grouped together, you will gain insight into the language of customers so that solutions can be more closely mapped to their vernacular.



- Search results – Analyzing search results lists can identify which solution answered a customer’s question and where it appeared in the list so that solution ranking can be improved. This provides a measure of content usefulness and how easy it was to find, while also pinpointing gaps in the knowledge base.
- Content vitality – Track the amount of content that is being added, modified or deleted on a monthly basis. If the vitality of the knowledge base starts to decrease, it may indicate issues with the knowledge management strategy. For example, it may indicate conflicting priorities getting in the way of maintaining the content, such as not allowing agents enough wrap-up time to contribute.

Conclusion

The best practices discussed in this paper have been used with repeated success by Verint customers. In combination with the Verint proven solutions for e-service, self-service and call centers, these practices have helped support organizations achieve a level of service that drives higher rates of customer satisfaction and loyalty, agent productivity and operational efficiency.

Verint Professional Services can help you implement these best practices with comprehensive strategy development and implementation design services to maximize the value of your knowledge management solution. These services include:

- Advisory services to help you establish quantifiable business goals and a strategic roadmap to ensure the success of your knowledge management project.
- End-to-end deployment services based on quality assurance methodologies to help ensure implementations are completed on time and on budget; meet business objectives; are stable, scalable and easily maintained; and achieve the projected ROI.
- Optimization services to help ensure that the performance of the technology solution meets expectations.

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