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MIGRATING TO A CLOUD CONTACT CENTER: TALES FROM THE FAR SIDE

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Cloud, The De Facto Standard

While the use of customer relationship management software (CRM) in the cloud has become the de facto standard, its rise to this elevated position did not happen overnight. It was a bold move by Marc Benioff and his co-founder Parker Harris in 1999, to create Salesforce.com and the first software-as-a-service CRM, that heralded the current generation. Now in 2019, cloud customer relationship management software rules the day, with a reported 80 percent of all CRM deployments.

In the Contact Center, Transition to the Cloud is Well Underway

For the contact center, the move to the cloud has been slower and for a good reason. Voice is real-time, and twenty years ago the technology was not yet available to reliably and securely support high-quality voice from the cloud.

Beginning about ten years ago, that began to change. Technical standards like Session Initiation Protocol (SIP) and WebRTC (Web Real-Time Communication), and the continual efforts to improve upon them, have been key in perfecting the cloud delivery of voice interactions to contact centers.

About five years, the inclusion of cloud contact center alternatives in just about every new contact center decision became the norm. For the past few years, thousands of companies large and small have chosen contact center-as-a-service (CCaaS) every year. At the same time, the proportion of businesses choosing traditional premises solutions continues to decline year over year. The direction of change is clear.

In the sections that follow, we will highlight the experiences of four companies as they moved their contact centers to the cloud. We will detail the factors that drove the change to initiate a change in their contact center solution, the benefits they have derived since implementation and some of their plans for adding functionality in the future.

Salesforce

As discussed above, Salesforce has been a pacesetter in the migration of applications to the cloud, not just for the CRM market but for the enterprise software market in general.

But, like many other companies, their early choice for deploying a contact center was a premises-based system. Why? Were there no cloud-based contact center solutions available?

Twenty years ago, there were a handful of cloud contact center solutions available. They likely did not, however, meet the sophisticated needs of a rapidly growing firm quickly expanding into international markets.

Moving the Contact Center to the Cloud ... Over and Over

In 2009, Salesforce re-examined its contact center software choice in light of the new cloud offerings that were entering the market. After surveying the available options, the company chose Serenova as their cloud contact center solution. Initially used in a portion of Salesforce contact centers, over time the deployment has grown and today Serenova's application supports over 3,000 agents both in the US and internationally.

If you know anything about Salesforce, you know that they have grown to their current $10.5 billion in revenue size both organically and through acquisition. In 2018 alone, the company acquired five companies. Some of the acquisitions that were made were large (MuleSoft and Datarama) and others were smaller.

What may be less obvious is that typically the largest of these acquired companies, understandably, have contact centers deployed. These are frequently premises-based systems. In many cases, Salesforce decides that it makes sense to transition those contact centers to the cloud. They have standardized on Serenova's solution for these migrations.

Common Processes

A recent example of a Salesforce contact center migration driven by the purchase of a company happened in 2015. ExactTarget, bought in 2014, became Salesforce Marketing Cloud post-acquisition. What prompted the decision to move from the existing premises contact center system to Serenova? As a cloud software icon, the answer may seem obvious, but ExactTarget had already purchased and deployed perpetual licenses for the system that was in place. There were annual maintenance fees but moving to Serenova would involve a fairly significant change for both agents and administrators.

> ## One, Big, Happy Family
>
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>
> It did not hurt that we no longer had to worry about any on premises issues."

Zane Gamble, product manager at Salesforce, explained that the answer was common processes. Salesforce decided to incorporate Marketing Cloud into the company's overall call path. They wanted to ensure that all call flows both worked and sounded the same to customers. This would help guarantee that customers would have a smooth customer journey, even if they were to move from a Marketing Cloud interaction to one handled by a Service Cloud agent.

All the existing agents and supervisors were trained on Serenova, explains Gamble. "Instead of having silos of employees working on different solutions, we decided to make everyone one, big, happy family. It did not hurt that we no longer had to worry about any on-premises issues."

Salesforce agents are working on Serenova through the most modern desktop available, Salesforce Lightning. Using Salesforce digital interaction applications and Serenova for voice, agents have access to not only customer data but information on interactions that may have taken place in Salesforce Live Chat, SOS, or one of many social media channels. According to Gamble, integration with Salesforce Live Message may be the next channel added.

Gravie

Gravie is a self-described start-up, working to reinvent the provision of health benefits and make them more accessible and more affordable for employers and employees. The company describes itself as "one-part smart tech and one-part human touch."

Gravie was founded in 2013 in the throes of the initial confusion generated by passage of the Affordable Care Act. Working with the Gravie team, a business (or individual) can design, build and execute a custom benefits plan. The goal is to controls costs and empower people to make their own choices.

From Homegrown to a Formal Contact Center

Once an employee or individual subscriber is set up, they have access to Gravie Care. Gravie advisors are available year-round to answer questions and troubleshoot problems with benefits. Being a tech-driven firm, and a start-up, the contact center operation was initially small.

"We used homegrown technology that our really smart IT and engineering department had created," explained Kaitlin Daeges, Director of Member Service Operations for Gravie. The internally-developed system was used to distribute and record calls as well as to create management reports.

> ## Homegrown Technology Upgrade
>
> "We used homegrown technology that our really smart IT and engineering department had created."

The decision to upgrade to a formal contact center solution was born of success. Daeges describes Gravie as, "growing by leaps and bounds." The company wanted to ensure that going forward, their customer care operations was built on a solid foundation.

Easily Add Functionality

As Gravie began its search for a packaged contact center solution, they knew from the outset they wanted a cloud-based application. For Daeges, that meant the company would be able to update the solution easily and that when new functionality became available, Gravie IT employees would not have to manage the upgrade.

Daeges explained that initially Gravie has deployed a voice contact center but is already looking at adding capabilities. One the of first changes the company is looking at is integrating Serenova with the CRM system Gravie uses. Another is the allow the online form that prospective customers complete to be "popped" to agents when the customer calls, to ease the customer journey from the web to the contact center.

> ### 10 Steps Ahead of Customers
>
> " We want to understand who our customers are and why are they calling. We want to get ten steps ahead of them, so they don't have to keep repeating information."

"Our vision is to integrate everything so that we can be more proactive with our clients," explained Daeges. "We want to understand who our customers are and why are they calling. We want to get ten steps ahead of them, so they don't have to keep repeating information." Given this vision, it is easy to understand why Gravie knew that a cloud-based contact center solution would be the best fit for their business.

City Facilities Management

City FM Australia provides innovative facilities management solutions that ensure successful, long-term outcomes for its partners. A husband and wife team founded the company in the United Kingdom in 1985 on the values of collaboration and transparency, replacing traditional client-contractor relationships with long-term, mutually beneficial partnerships. A unique strategy would be designed for each partner, shaped by and needs of their business and implemented with a custom, self-delivered model.

Over 35 years later, City FM employs more than 13,000 people and has divisions across five continents. For this project, we spoke to City FM Australia, who moved their contact center to Serenova in 2018. In addition to strong partnerships with leading retailers, including Coles and Target, City FM Australia works with partners in other industries.

End of Life System Necessitates New Choices

The contact center plays a vital role in the services City FM Australia provides to its partner businesses. Michael Jackson, Systems Architect in City's information technology department, explains, "For any issue in a store, a manager calls through to our contact center." For example, if someone finds a shopping trolley, or cart, in their front yard, they call, and City arranges to have it picked up. If there is some kind of emergency, for example, if someone is injured, there is a critical incident number that store managers can use. Jackson said that in Australia, there are approximately 30 different services that are provided to City's facilities management customers.

When City discovered that the premises-based contact center system it was running had been categorized as end-of-life by

> ### End-of-Life Solution
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> "[Our previous solution] was hindering the growth that the company was experiencing. It didn't have the capacity to expand and needed to be replaced."

the vendor, it became the impetus they needed to re-examine their contact center needs. The existing system was about eight years old and, according to Jackson, "was hindering the growth that the company was experiencing. It didn't have the capacity to expand and needed to be replaced." In addition to company expansion, City was moving some of its services off-shore, from Australia to Malaysia, and the existing premises system couldn't easily support that. Finally, the reporting tool for the existing system "wasn't great."

Dramatically Improved Routing

Since the implementation of the Serenova Engage cloud solution, agents can be based anywhere. For City, this means they can have agents in Malaysia and Australia taking calls from the same queues at the same time – something that was not possible with the premises-based system. This allows City to provide a more seamless transfer from one set of agents to the other, as they close their Australian centers and Malaysia picks up after-hours interactions.

Another routing benefit has led to an even more dramatic improvement in City's contact center operation. With the premises system, agents were assigned to six or seven different queues, or services. However, calls were not automatically routed - agents were able to select their next call from any of the queues with calls waiting. This led to situations where supervisors needed to be telling agents to "pick up calls on this line" or "go off that line" – it was very reactive.

"With Serenova, we were able to put in more of a logical matrix of calls an agent should take so that they don't have need to worry about deciding on what call to pick up," Jackson explained. Now, the manager doesn't need to worry about whether priority calls are being handled appropriately. Jackson continued, "When we put in Serenova, there was an immediate improvement in the KPIs (key performance indicators) related to answering calls."

> **Immediate Improvement in KPIs**
>
> "When we put in Serenova, there was an immediate improvement in the key performance indicators related to answering calls."

Global Food Manufacturer

Global Food Manufacturer is a multi-billion-dollar company in the food processing business that distributes its products to over 50 countries. The company has been in business for over 100 years. (Preferring anonymity, we will refer to them here as GFood.)

As an established firm with product lines that are sold to millions of consumers worldwide, GFood has deployed contact centers for a variety of applications. There are external-facing centers for consumer customer service, sales, and dealer communications as well as internal centers for individual departments, e.g., help desk and human resources. With global customers and operations, GFood has contact centers located not only in the United States but in Europe and Asia as well.

Re-Visiting Best of Breed

The Information Services manager (IS Manager) at GFood explained that when the company started deploying call centers in 2006, they went down the path of what he termed a "best of breed" solution. Ten plus years ago, that meant a premises-based solution with sophisticated features. That sophistication brought with it complexity, both in terms of the number of vendors required to create a full solution and in the time it took to make any meaningful change to the system operation.

> **Best of Need Not Best of Breed**
>
> "After identifying a lot of different requirements from the different groups that are participating in migrating away from the old vendor, we saw that best of breed was unnecessary."

Three years ago, GFood began a contact center migration to the cloud with its existing vendor. They realized over time, however, that the "cloud" solution they deployed did not bring with it the ease of administration and geographic flexibility they required.

In 2018, GFood made the decision to re-examine their contact center solution. "After identifying a lot of different requirements from the different groups that are participating in migrating away from the old vendor, we saw that best of breed was unnecessary."

The Difference Between Cloud and True SaaS

GFood discovered, as have many companies before them, that there many definitions of cloud. For premises solution providers, the initial forays into cloud meant dedicated hardware and software deployed in the customer's data center, or the vendor's data center or a center of one of their partners. The next step often was to have a number of customer deployments share hardware, but still have a dedicated software instance. While these solutions were labeled "cloud," these approaches are better categorized as hosted or managed services deployments.

This was the kind of hosted solution GFood found themselves running. Complicating matters was the fact that this hosted contact center was deployed in conjunction with premises-based telephony infrastructure, in a hybrid model. GFood discovered that this complex deployment was not bringing the advantages GFood believed they would gain by operating in the cloud.

GFood found that any time there were issues, the contact center vendor would point a finger at the telephony vendor, saying the integration was the problem. In addition, GFood found it was not only costly but took a significant amount of time to make changes necessary to the operation of their centers.

IS Manager shared that international presence was one of the key factors in the decision to choose Serenova. It allows ease of administration not only locally but ultimately for GFood's international centers as well.

As of this writing, GFood has not moved all of its various contact centers to Serenova. But IS Manager described a roadmap where additional functional areas and international partners in Europe and South America would move to Serenova over time.

A Smooth Transition

> **It's Been Seamless**
>
> "With the cloud based solution, we are 100% voice over IP, and it's been seamless. As long as you have a clean internet connection, that's all you need."

When asked what is different in the contact center operation since the implementation of the Serenova software-as-a-service contact center solution, GFood's IS Manager says life is good, especially compared to the vendor finger-pointing of the past. "With the cloud-based solution, we are 100% voice-over-IP, and it's been seamless. As long as you have a clean internet connection, that's all you need."

The technical simplicity of the CRM integration is another benefit that GFood is enjoying. As IS Manager explained it, instead of information flowing from Salesforce to GFood's telephony and then to the contact center, there is a now direct link between Salesforce and Serenova.

Digital Transformation Meets Customer Experience

Despite its name, the focus of digital transformation is not on technology but on customer experience. Technology has not only changed how consumers shop, but also how they find products and interact with organizations. One can think of digital transformation as keeping up with technology for the customer's sake, something each of the companies discussed here is accomplishing by migrating their contact center operations to a software-as-a-service model.

While their final destination may have been the same, the four companies discussed here took very different paths.

> Born in the cloud, Salesforce began moving its contact centers there with Serenova once it made sense when all the technology stars aligned. Today, they continue to migrate to the cloud companies they acquire that have not yet made that transition. The benefits they derive center on enabling their customers to have a seamless journey across different Salesforce businesses and allowing their agents to deliver flawless service based on a full view of customer information

As a business born to disrupt the health care insurance market digitally, Gravie only considered a cloud-based contact center solution. When their customer care operation grew to the point where a formal contact center was needed, the choice of Serenova allowed them to handle the phenomenal growth they are experiencing. It also allows them to take advantage, automatically, of the new customer experience features and functions being added by Serenova regularly. In the past, with a previous home-grown routing solution, new features would have meant taking IT professionals off core Gravie projects.

City Facilities Management's story of facing the end-of-life scenario with the existing premises-based contact center system will likely resonate with many readers. It turned out to be the wake-up call the company needed to replace it with a system that better meets the needs of their growing business. City FM's tale of an "immediate improvement in KPIs" is not an uncommon one. The level of functionality mid-sized contact centers has access to with cloud-based solutions typically far exceeds what was available at a reasonable price, with premises solutions.

The lesson one can learn from GFood's path to the cloud is not all cloud contact center solutions are created equal. Because cloud has become the technology of choice, some companies are putting what might be thought of as "lipstick on the pig," dressing-up traditional

premises solutions as cloud. With the Serenova deployment, GFood is finally benefiting from the location-independence and self-administration that true contact center-as-a-service delivers.

As seen in the stories of the companies discussed here, keeping abreast of technology in customer support and the contact center means different things to different companies – depending on their starting point. Perhaps the key takeaway from these stories is that customer care should always be evolving, with the goal of constant improvement for both internal and external stakeholders.

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About McGee-Smith Analytics

Sheila McGee-Smith, the founder and principal analyst at McGee-Smith Analytics, is a leading customer experience industry analyst and strategic consultant with a proven track record in new product development, competitive assessment, market research, and sales strategies for customer care solutions and services. Her insight helps enterprises and solution providers develop strategies to meet the escalating demands of today's consumer and business customers. She is the contact center track chair for Enterprise Connect, and her views on the market can regularly be found on NoJitter.com and through her Twitter feed @mcgeesmith.

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