The Smart and Simple Path to a High-Value Cloud Contact Center Solution

Three Steps to a New Operational and Technology Paradigm

By Lori Bocklund, President – Strategic Contact, Inc.

STRATEGIC CONTACT

Contact centers hunger for "fast and easy" solutions to the challenges they face. It's no wonder. Problems, pressures, and deadlines bear down on them from all sides.

Senior management expects the contact center to deliver a steady stream of efficiencies while positively impacting revenue. The center seeks relief by finding ways to offload customer contacts to self-service and reduce handle times through training, coaching, process changes, and desktop technology. Simultaneously, they are expected to be in hot pursuit of the wide range of channels that respond to customer demands, such as chat, text, social media, and video. And while they're at it, every interaction presents the opportunity for acquisition, retention, and growth of customer relationships. Progress in all of these areas requires a combination of strategy, processes, staff development, and technology – rarely a "fast and easy" endeavor.

What holds centers back from fixing what ails them? One BIG culprit: an abundance of long-standing technology and the associated long-embraced business practices that have little hope of realizing operational efficiencies or bolstering revenue. After so many years (30+!) of contact centers and ample opportunity to get it right, customer experiences continue to fall short of expectations, centers fail to meet performance goals, and companies struggle to leverage information and close the loop on insights and actions to optimize end-to-end interactions. *Something's got to change.*

While centers teem with pressure, cloud vendors are offering exciting new delivery models that are intentionally disruptive to the contact center technology market. Yet this disruption could be the best thing to ever happen to centers... if they are willing to shift their paradigm. Herein lies an *opportunity to change.*

To gain the business outcomes leadership seeks, centers need to move beyond the "fast and easy" message common among cloud contact center technology vendors and spin it to a "smart and simple" mantra that can deliver great value to those ready for a different path. Three steps – rethink, reimagine, and redefine – can lead to positive impacts on efficiency and the bottom line.
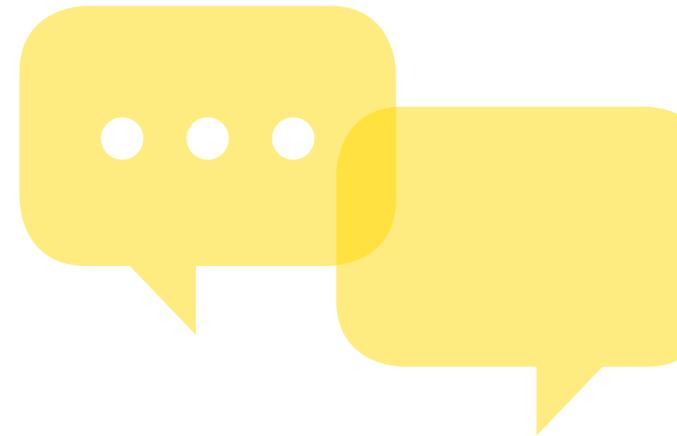
The Smart and Simple Path to REMAKE Your Center

1. RETHINK
- Assess the current state with a critical eye
- Consider operational practices and technology use

2. REIMAGINE
- Consider cloud contact center technology
- Differentiate vendors and solution types

3. REDEFINE
- Things to retain, things to do differently
- The way functionality is delivered and managed

REMAKE leads to RESULTS
- Use new technology in new ways
- Deliver business value (efficiency *and* revenue, plus an enhanced customer experience)

ONE:
Rethink Conventional Wisdom

Most centers would benefit from a fresh look at how they operate and leverage technology. Even beloved solutions may be based on technology that dates back to the 1980s and 90s in its principle design. If you've been around centers long enough, you know that era was about phone calls and ugly desktops, not multi-channel customer journeys and web-based applications. Operational leaders and staff were driven by printed reports, not dashboards on mobile devices and the need to understand not just what occurred, but why. And we all know things today change at a much more rapid pace. Add to the mix today's business demands for agility – functional and capacity – and it's clear that centers need to look for new alternatives.

So if you're nodding your head and agreeing that your center is ripe for a remake, where do you start? Challenge yourself to *rethink* conventional wisdom on the delivery of the customer experience, looking at where your current state reflects "convention" but not necessarily "wisdom." Here are some easy examples: Are you using the right metrics, in the right ways? Supporting the right channels? Asking the right questions and gathering the right information to effectively service your customer? Using skills to everybody's advantage? Honest answers to these types of questions catalyze change in mature as well as fledgling centers. That careful review of the current state gets you started on what needs changing, gaps to fill, and any stakes to build around.

Are you using the right metrics, in the right ways? Supporting the right channels? Asking the right questions and gathering the right information to effectively service your customer? Using skills to everybody's advantage?

MOO!

PUT SOME "SACRED COWS" OUT TO PASTURE

As you assess your center, consider this "top five" starter list of sacred cows that may be ready to be put out to pasture.

1. **Metrics** that drive the wrong behavior or are inconsistent with other accountabilities and business goals. There is no place for mixed messages in the contact center.

2. **Reports** that are only created and circulated each week because of tradition. If nobody really uses the content, it's time for them to go.

3. **Skills** that are messy and confusing and not essential to call segmentation (e.g., for training, for delineated roles and responsibilities tied to experience, systems access, languages, etc.).

4. **Menus** with prompts that are of no value to the customer or the center. If all the paths route to the same place, or the information gathered isn't passed on to an agent, they probably aren't needed.

5. **Knowledge content** that is so out of date nobody trusts it. If the agents don't use it, toss it, update it, or replace it.

Refocusing your contact flows, contact handling, and performance management to what the constituents (customers, agents, supervisors, and analysts) really need could lead to big gains for your center.

While the initial assessment can help define things to *stop* doing, or *continue* doing, you can go a step further to define what you need to *start* doing. A strategy session can be a fun, compelling, and productive way to get everybody's energy and ideas flowing to envision a new approach to operational practices and application of technology. No holds barred brainstorming from various perspectives (e.g., leadership, frontline staff, support functions, and of course, the customer) can define what's possible. Then, layer on a bit of reality to help refine the vision, prioritize next steps, and define your future. The most forward-thinking centers will even take time to conduct focus groups with the key constituents in the quest for change: frontline staff and customers. Their input can deliver some eye-opening insights to anyone defending the status quo, and offer up new viewpoints into what will make the center hum.

A strategy session can be a fun, compelling, and productive way to get everybody's energy and ideas flowing to envision a new approach to operational practices and application of technology.

TWO:
Reimagine Solution Delivery

Armed with a vision, it's time to figure out what type of solution will enable you to get there. For most, that means it's time to look at cloud contact center technology, recognizing the tremendous momentum for centers of all sizes and degrees of maturity. While it may have started with the small centers (the predominant early adopters), cloud solutions have crept up to mid-size and now larger centers. And the offerings have developed from the basics to broader suites of capabilities, across media and functionality. Today's cloud solutions can address voice, email, chat, text, social media, and even video. They include robust routing and reporting, scorecards and dashboards, call recording, voice response, desktop integration for screen pops, and more. And most offer options for performance tools such as quality monitoring and workforce management.

But not all cloud solutions are created equal – or in the same fashion. A prospective buyer should recognize distinct differences in the market options. Solutions designed for the cloud are inherently multi-tenant and multi-channel, built with factors such as simplicity, agility, and speed as core values. The pull is compelling.

Great vendors distinguish themselves by how well they help you meet those "pesky" business goals for efficiency and revenue.

Traditional premise vendors leverage the history of proven solutions as they add cloud options to their portfolios. They retain more of the legacy architecture, functionality, and deployment, and support characteristics in the process. As such, "fast and easy" is not typically their mantra.

True cloud solution vendors will happily get their toe in the door quickly, easily, and with low expenditures. That IS their mantra. However, the *great vendors distinguish themselves by how well they help you meet those "pesky" business goals* for efficiency and revenue – on the first day you go live, and for subsequent stages of growth and development. Those seeking to reimagine solution delivery that also delivers results will recognize the importance of this distinction.

While the allure of cloud solutions can be strong, the attraction of a simpler way to achieve results sooner is really just a starting point. Without slowing down too much, pursue some key steps to find the right solution and vendor (see sidebar). Even in a world driven by speed, it's very important to get it right. In fact, "good" trumps "fast" in almost every situation.

PROPER DUE DILIGENCE ON THE PATH TO YOUR NEW SOLUTION

With cloud solution vendors and their partners pushing "fast and easy" and free pilots abounding, it's tempting to "just do it!" But a little due diligence can go a long way in ensuring you select the right solution and partner to help you reinvent your center. After you've defined your vision and plan, and have requirements in hand, these steps are keys to success:

- **Qualify vendors (and their partners, where appropriate) on screening criteria** – Move past marketing messages to the differentiating factors that matter the most to you: functional, architectural, implementation, support, SLAs, etc.

- **Get bids from a few based on defined requirements** – It doesn't have to be a full "RFP" but documented clarity on what you need and want will help you compare prices and abilities, and keep the vendors honest and accountable.

- **Conduct collaborative due diligence** – Buyers and sellers benefit tremendously from engaged discussions (spend a day – or more – together) focused on the business goals, while ensuring the functionality, user tools, architecture, implementation, support and pricing won't disappoint.

- **Review and discuss SOWs and SLAs** – Once you're feeling good about a solution and vendor, dive into the Statement of Work and Service Level Agreements so you have a clear understanding of what you're getting in both implementation and support.

THREE:
Redefine Your Approach

Vision? Check. Solution type? Check. Then it's time to go deeper in defining what you want from a vendor and exploring who will meet those needs, and seek a simple and smart solution, not just a fast and easy one.

As you *redefine* your approach, it's good to start with the basics. Identify the things you want to retain of your current world (or if a new center, the must-haves to get you started). Remember, you should find few sacred cows, especially in an era impacted by customers with mobile devices, workers who want "Uber-like" work schedules, supervisors who turn to their tablets instead of desktop PCs, and IT departments who have increasingly little time and interest in managing infrastructure and specialty applications outside the core business (like contact center technology!).

Then think about all the things you want to change (remember, you're rethinking and redefining), and focus on a new set of <u>functional</u> requirements, guided first by simplicity in achieving the business goals. Define the priorities for day one, starting with core routing and reporting, for the appropriate media. Look at both inbound and outbound contacts, and consider self-service, proactive notification, and assisted service. Think about how you really want to view and use performance metrics, not just to recreate your past reports but to really take a fresh look at what you measure, how you share outcomes, and what you will do with the results.
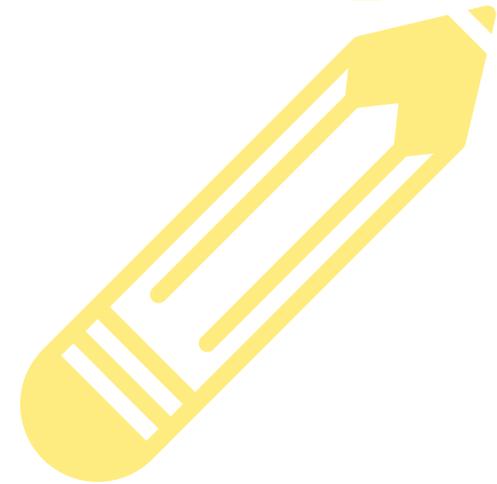
As you redefine your approach, it's good to start with the basics.

The next step is to identify the new things you will want to do as you reinvigorate and reinvent your center. Perhaps dynamic menus and prompts that consider the customer responses and situation will help deliver a better customer experience. A better desktop with information populated quickly to address the customer needs helps both agents and customers. And integration of mobile and web applications may be essential as you consider the expansion of media required to respond to your customer expectations and competitor influences. Don't forget performance tools beyond reporting: call recording, quality monitoring, workforce management, scorecards/dashboards, analytics, and more.

Outline the prerequisites for technical requirements, driven by things like:

Reliability –
perhaps you are expecting geo-redundant data centers, automatic failover, and reliability for a system you can always count on

Integration –
most companies seek open interfaces and connectors to desktop applications (like CRM) and connectivity to other enterprise users outside of the contact center

Security and compliance –
these may be table stakes for many, including financial services, insurance, and healthcare; add data storage and ownership as well for clear understanding of what sits where and who owns and controls it

Network connectivity –
both the contact center and IT need to weigh in on options that meet your budget, agility, and performance requirements

Critical business needs are not just about the solution; the provider of that solution matters tremendously.

Critical business needs are not just about the solution; the provider of that solution matters tremendously. Include critical elements of <u>implementation</u> and <u>support</u> that identify the partner that will guide you and sustain you in delivering business value. Consider knowledge transfer and user tools that deliver the agile, responsive environment you need. Seek assurances of 24x7 monitoring and a staffed Network Operations Center (NOC) that let you sleep well at night, with visibility into performance that backs up the stated commitments. And when your procurement, legal, and/or financial folks get involved, you'll want agreements that are also simple and smart, pricing structures tied to the agility you seek, and clear SLAs, monitoring, reporting, and remediation. While all that may sound like a "pipe dream," today's market and the new vendor paradigms can make that dream a reality.

Is It YOUR Time to Change?

Too many centers pursue only incremental improvements, often hindered by legacy technology and embedded practices that may only be substantiated by history ("we've always done it this way"). In the worst cases, companies buy new technology and then force fit it to do the same things they've always done. That may seem like the easy path, but it fails to deliver impactful results and is rarely fast or low cost (short term or long term).

The convergence of business pressures, market directions, age-old approaches, and waning technology creates a perfect opportunity for those willing to embrace change. Don't just redo or renew your center; *remake* it with a fresh look that challenges the status quo and leverages new technology in new ways. You'll reap the business value sought by center leadership and executive management, create a new environment for frontline users to succeed, and enhance the customer experience in the process.

Don't just redo or renew your center; remake it with a fresh look that challenges the status quo and leverages new technology in new ways.

ABOUT SERENOVA

Serenova simplifies every aspect of the customer experience, from front office to back, to make life easier for you, your customers and your employees. The world's most passionate, customer-focused brands achieve brighter interactions, deeper insights, and more meaningful outcomes with Serenova's always-on, highly secure, true multi-tenant and instantly scalable Contact Center as a Service (CCaaS) platform, CxEngage. Headquartered in Austin, Texas Serenova has operations in California, Canada, the UK and New Zealand. **Learn more at serenova.com**

ABOUT STRATEGIC CONTACT

Strategic Contact is an independent consulting firm that helps companies optimize the value of their customer contact technology and operations. Strategic Contact helps companies develop and execute plans tied to business goals, conduct assessments and build roadmaps, develop technology requirements, select appropriate solutions, and manage projects to successful implementation. **Learn more at strategiccontact.com**

ABOUT THE AUTHOR

Lori Bocklund is President of Strategic Contact and a widely recognized and respected expert with over 29 years of experience in contact center strategy, technology and operations. Lori has written dozens of articles for industry publications and has presented at conferences around the globe. In 2015, she received ICMI's Lifetime Achievement Award for her contributions to the contact center industry.