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Best Practices for VoIP in the Contact Center Part 3: Changing Support Roles to Optimize VoIP

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Voice over Internet Protocol (VoIP) has reached a new level of maturity in the contact center industry. We can now shift the conversation from “Why should I do VoIP?” and “When and how should I move to VoIP?” to “How do I successfully use it?”

Because VoIP is such a rich, deep and complex topic, defining best practices for planning, implementation and support requires more than one article. Our first article addressed how to plan for VoIP ([Planning a Successful Transition](#)) and the second article focused on implementation ([Steps for a Successful Implementation](#)). This third and final part in our series addresses the changing support roles required for VoIP. We hope it will help those who are on their way to implementing VoIP — or anticipate they soon will be — put all the right elements in place to ensure ongoing success.

Once VoIP is in the house, you can't go back to business as usual. Take those new practices and partnerships to the next level to make the most of this valuable new addition.

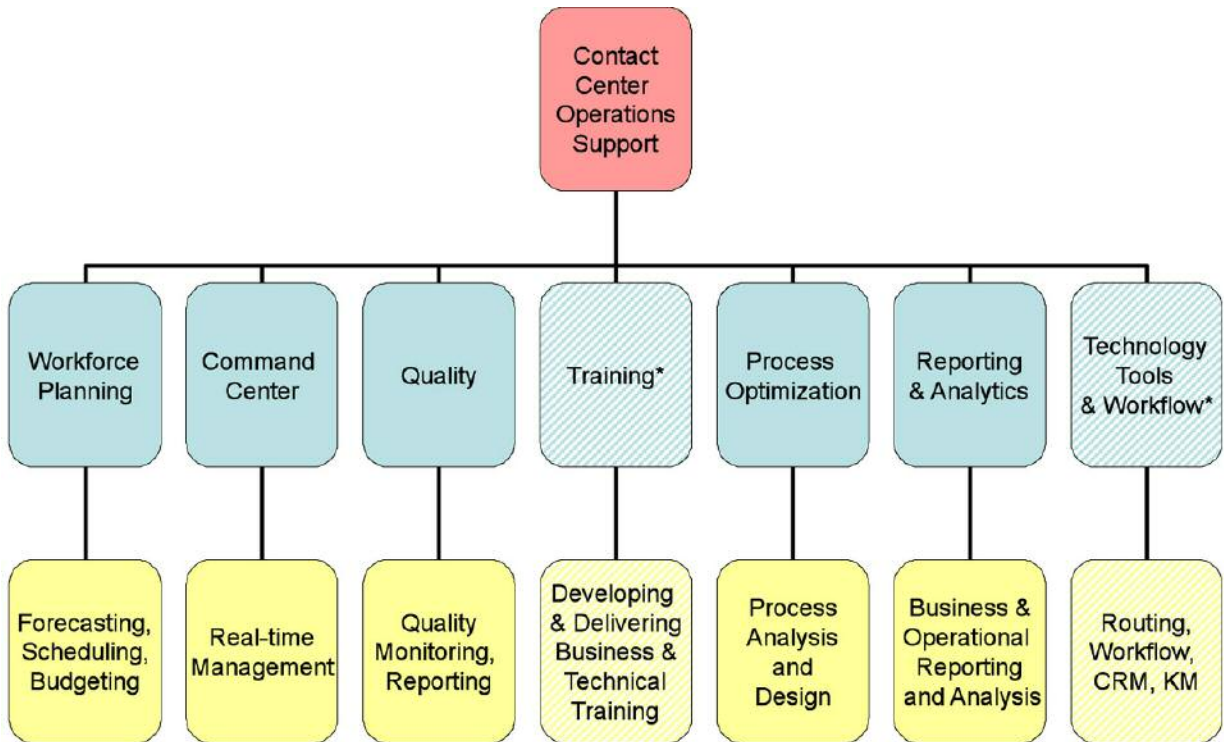
SUPPORT REQUIREMENTS AND CHALLENGES — FOR IT AND THE CENTER

VoIP differs from the traditional telecommunications or telephony solution. This is not your typical proprietary “refrigerator cabinet” voice solution that telecom staff have known (and sometimes loved) for many years. Servers, gateways, routers and switches, standard operating systems, data network protocols, standards compliant endpoint devices (hardware and/or software based) all combine to make this new environment more familiar and potentially more attractive to the data team in IT. However, by its nature, VoIP requires that we bring together the experience, knowledge and skills of both the data and voice teams to support this new environment that must

retain some of the most important characteristics of voice communications.

The first requirement and challenge of VoIP support is in IT: Bring the knowledge and skills of voice veterans and their counterparts in data networks, systems and applications together to define roles and responsibilities for managing, supporting and optimizing the system. Now that voice has this new architecture, it requires the same discipline and governance applied to other software applications for patches, upgrades, security and reviews. IT/Telecom must define a software-centric support model applied to mission-critical applications for voice that recognizes the 24x7 demands of many call centers and the “five 9s” mindset of virtually no downtime. This new voice sys-

Figure 1: Functional View of Best Practices Support Roles in Today's Contact Centers



* These functions are often outside the contact center (in HR and IT)

tem may demand updated and modified operations, administration and maintenance plans that take into account these key requirements.

The second requirement and challenge of VoIP support is for call center operations: The way centers operate is changing. Any company with multiple centers from different business units will do well to take an enterprise view. Also, VoIP often triggers additional — or improved — media handling, bringing email, text chat and other media into the mix with voice calls for routing and reporting. As discussed in the first two parts of our article series, virtualization across multiple sites is a compelling reason for VoIP, so VoIP often operates with more distributed frontline staff but more centralized support functions. And, as

these systems' administrative applications — for routing control, reports, etc. — have improved and IT departments become more thinly stretched, many companies seek to drive more control into the hands of the users, or into the hands of a "shared services" function (more on this shortly).

So VoIP introduces great potential for change for both the users of the systems and those who manage, maintain and support those systems. While change can be difficult, companies that implement VoIP with the endgame in mind will find much greater success with the technology and its application, as well as acceptance by users.

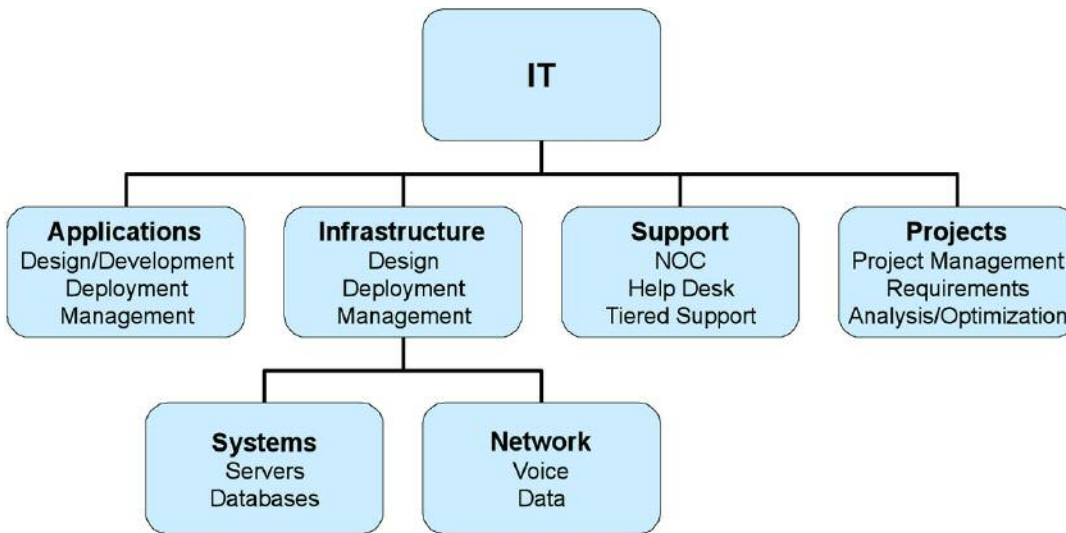
CHANGING SUPPORT ROLES

Independent of VoIP, contact centers require many support roles to oper-

ate and use technology effectively. Figure 1 shows a functional view of the roles included in best-practices operations.

The number of people involved in these roles, how they are combined, and where they report vary tremendously based on contact center size, structure, focus and complexity. For example, a small center may have no contact center operations support organization or dedicated roles. Rather, managers and supervisors wear some of these hats, while working closely with HR and IT to fill other roles. A large, multisite, multiple business unit contact center operation may have a shared services function that provides most or all of these functions, with many people involved and collaborating across functions. In a perfect world, as companies

Figure 2: Functional View of Best Practices Roles in Today's IT



move to VoIP, these support roles are part of some sort of centralized organization (centralized logically, not necessarily physically) to support a virtualized operation (with technology based at a hub or data center(s) and distributed resources).

To optimize VoIP support and application, and to get the most out of the technology investment, IT's relationship to the contact center and other associated support functions (shown in Figure 1) must be very clearly defined. In addition, the roles and responsibilities and accountabilities of IT to the operation must be very clear. Figure 2 shows a functional view of IT roles and responsibilities.

In our experience, the best-run companies have an IT mindset that the contact center is their customer and they only succeed when the operation succeeds. To achieve a good customer/provider relationship, there must be excellent collaboration on defining requirements, selecting and implementing technology, and deciding how to effectively provide, apply and support

the technology.

In a VoIP environment, the IT roles change. The infrastructure is basically the same for voice and data — standard servers, data network, etc. Voice is now an application on the network and needs people who understand its unique characteristics (i.e., the former telecom folks) and people who understand the data network upon which it now resides (i.e., IT/data folks). Traditional IT/data network support needs to evolve to include processes to respond quickly to issues impacting voice communications. IT needs tools to monitor VoIP performance in real time and processes and accountability to manage it continuously — analyzing and reporting, troubleshooting and planning for upgrades and other changes.

A NEW MODEL

The bottom line is that IT/telecom and the contact center need to be clear on who is doing what, when and how to meet the requirements defined by a mission-critical opera-

tion that is potentially 24x7, highly distributed, and has little or no tolerance for downtime. The support model has to answer key questions such as:

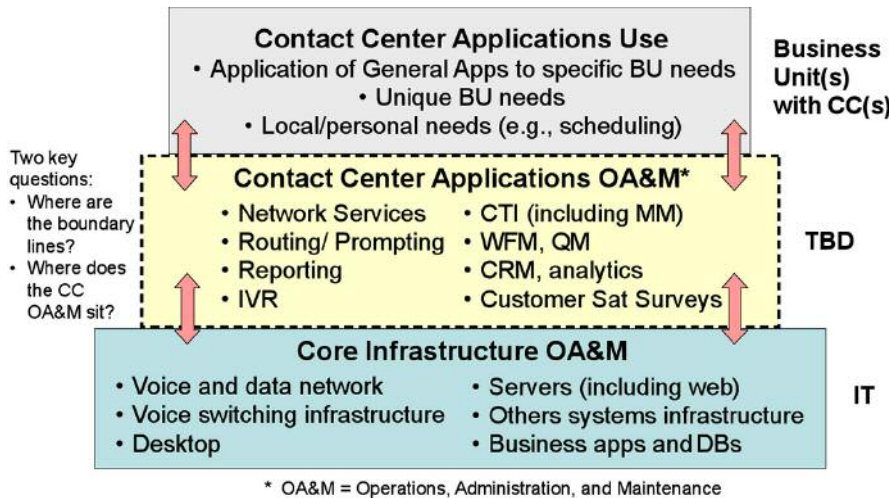
- > Where should we manage the call center technology? In the business/call center area, IT/telecom or some other (shared?) organization?

- > Where do we draw the lines between the different groups and their roles and responsibilities? Is it by function, by site or some other criteria? And how do we ensure collaboration and cooperation (not to mention avoiding anything falling through the cracks or duplication of effort)?

- > Do we source support internally or externally? And how do we ensure that the support supplier — whether internal or external — meets expectations?

The answers to these questions must consider business, operations and technology strategies, culture, resources, leadership, size, applications, experience, organizational history and organizational structure today, and more. There is no one right support model. But the com-

Figure 3: Support Model



panies that recognize that they must define a support model and address these types of questions as they move to VoIP in the contact center are the ones that will succeed. And this may be the hardest part about moving to VoIP.

Figure 3 presents what we call our “layer-cake model” for thinking about support functions in the VoIP-enabled contact center. The bottom layer is made of the things that just naturally belong in IT — core infrastructure operations, adminis-

tration and maintenance/management for voice and data hardware, software, networks, applications and databases. These functions should not be localized to the operation, and unless you are one mighty big company, should be centralized as a shared service. The top layer shows a limited set of functions that centers may handle directly because they are unique or specific to that business unit or require a very personalized focus.

The middle layer is the one full of questions. This is where companies need to spend more time defining the support model that fits the specifics of the organization and its needs. In the end, this middle layer may not even exist — IT, the contact center or a combination of the two may subsume it. Or, a focused, shared services organization that provides all the best practices to various contact centers across the

►Sourcing and Delivery Models Can Change the Game

As if the VoIP environment doesn't throw enough change and challenges at us already, there are different options for sourcing and delivery models — premise, hosted and managed services — that can alter the mix. IT's role and the support functions needed can vary tremendously based on which model the company pursues and how it structures that sourcing and delivery model.

This article series focuses primarily on premise-based solutions as the most typical delivery model. The company owns or leases equipment that sits on their premise. Inhouse staff has the lead role in support and management of the systems and network.

The up-and-coming models move much of the support responsibility — and perhaps the hardware and software — to third parties. A hosted model may provide all the hardware and software, or it may mean your company pays only a software usage fee and IT/telecom provides connectivity for voice and

data — on whatever platform you have or choose. A managed services model may include not only the equipment and functionality, but all the services to manage, maintain, and apply that technology.

Hosted and managed services models require you to define different security, availability, responsiveness and business continuity/resiliency plans than the typical premise-based model. And, the roles that inhouse resources play for changes and system application must be clearly defined and delineated from the roles the vendor(s) provide. The same principles defined in this article apply, but the support and optimization model takes on added dimensions working with your third party suppliers of hardware, software and/or services. The contracts and service level agreements between the users and the providers become even more important and require careful thought up front to ensure satisfactory operation once in production.

enterprise may be where it resides. This model should be used in combination with an “as is” model of the IT and support operations to define the “to be” organizational structure and support function roles and responsibilities that make sense for where you’re coming from, and where you’re going.

KEYS TO SUCCESS

The opportunities and options are many and companies must find the right organizational model and define the roles and responsibilities for each area and individual to optimize operations. We have defined a number of critical success factors for the organizational and support structure for companies that move to VoIP:

Take an Enterprise View

The days of a PBX/ACD per site or functional business unit are gone with VoIP. So VoIP demands that companies take an enterprise view when considering requirements, architecture, design and support. Sometimes this goes against the natural silos that exist and requires a catalyst — likely IT or senior leadership — to bring the groups together. Start at planning and funding, continue into implementation, and ensure that the ongoing operation and application of the new system considers the enterprise needs in defining the best support model.

Address Various Elements of Oversight and Execution

Support of any system has different elements to it, including:

- > New technology — strategy, planning and projects for new systems, or significant changes,

upgrades or additions to existing systems.

- > Existing technology operations, administration, and maintenance (OA&M) — change for business needs evolution (e.g., new skills and routing, new reports), as well as maintenance, moves/adds/changes, etc.

- > Support and troubleshooting — addressing problems whether on a large or small scale to resolve issues and support user needs.

A good support model for any contact center technology environment, and certainly for VoIP, addresses these three different situations. The model must define who is doing what, when and how fast, and the reporting mechanisms to satisfy all the business needs. A wide-ranging and well-defined governance model is essential.

Define a Clear Accountability Model

Another key element of the governance model is clear accountability. Consider using “RACI” models to clearly define key support processes: Define who is Responsible, Accountable, Consulted and Informed for each major step in support processes. Using these types of tools and documentation takes the mystery out of support and reduces finger-pointing, second-guessing and distrust between organizations. Ideally, the accountability model includes financial accountability, as well.

Define KPIs and SLAs Between Organizations

Perhaps the biggest key to success — and one of the most difficult — is to define key performance indicators and service level agreements between organizations. If IT is responsible for making routing

changes, what timeframe must they commit to in order to meet the business needs? Who gets to categorize a trouble ticket category, and what are the acknowledgement and resolution timeframes on various levels? These types of issues are important internally, and they become even more so if support involves outside organizations (see sidebar).

Establish a Clear, Strong Business Analyst Role

Business analytics (BA) acts as a liaison between the business and a support function (IT, shared services or others) in addition to conducting the functions assigned, such as reporting, analysis, routing optimization, etc. Clearly define these BA roles and give them accountability for their actions. Ideally, carefully select the people who will fill these roles — whether from inside or outside the organization. Communications skills (verbal and written), analytical skills and follow-through are top characteristics to look for in these individuals.

Ensure Good Communication and Collaboration Between Groups

This critical success factor might seem too obvious to state, but it is so critical and so often lacking that we feel compelled to include it here. The contact center succeeds in applying VoIP when it is in lock-step with IT/telecom throughout the project and on an ongoing basis. The support model points to the interdependency of these organizations.

THE RIGHT POINT OF VIEW

VoIP is an exciting opportunity for contact centers, but it is only optimized when viewed as more than a technology change: It is a process

and organizational change, as well. Tackle the task of defining the right support model to ensure that big investment in technology pays off and proves successful for IT and the center. ●



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