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▶ TECHNOLOGY

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for directors,
managers, analysts
and technology managers

Finding the Right Vendor Partner

It's not just about the product. In a buying decision, the distributor can be equally important.

As companies seek to upgrade, enhance or replace technology, they go through various vendor evaluation processes — RFPs, presentations, site visits and meetings galore. Much of the time and energy during evaluation focuses on the products: the features and functions, the architecture and the ways that the technology can help a company achieve its business goals. While these are very important factors in a decision, there is an element that is too often overlooked or undervalued in today's market: The distributor that will be responsible for the sale, delivery and potentially the support of the solution. This article highlights the importance of the distributor and how to find the right one to deliver the products you want.

MARKET REALITIES

In today's contact center technology market, most major ACD/CTI/IVR vendors like Aspect, Avaya, Cisco, Genesys, Interactive Intelligence and Nortel use distribution channels. While many of these product vendors will sell to end-customers directly, they have agreements with distributors or value-added resellers to gain greater geographic coverage, ease the contracting process and extend their reach. These distributors can also bring ties into other products such as QM, WFM, CRM and KM and offer a broader resource pool to draw from for feedback into product development. The product vendor's direct sales and professional services teams are often reserved for large accounts that demand more of the products and services and those willing to pay



higher prices for the direct attention.

A prevalent buyer's mindset in today's market is the desire for "suite" solutions and "one neck to choke." As a result, a buyer may bundle a broad range of products into a single procurement effort if they can find a provider who can deliver what is needed at the desired cost. Sellers find a way to deliver on this need through a variety of approaches. Some vendors' products offer a full suite (such as Interactive Intelligence), and thus their distributors can naturally offer all elements. Some distributors have their own products to fill out the suite (such as Spanlink), while others will leverage further partnerships (for example, with performance tool vendors such as Nice or Verint). Regardless, the market trend toward bundling can be met through preferred delivery channels.

The net of these market realities is that the distributor becomes a key player in product delivery. As a result, their focus on the call center and ability to be a trusted source for meeting business needs becomes critical.

THE DISTRIBUTOR'S ROLES

The realities of the market show that the distributor plays a significant role in many processes — in sales, implementation and potentially support.

During the sales process, they are the orchestrator of a complete solution that addresses all the customer's needs. They must tap the right resources within their own, as well as the vendors' environment to present the best solution to meet the requirements. This role can include determining which products to bid, how to design or configure them, the level and type of professional services required to meet the business needs, and how to price to win the business.

During implementation, the distributor's professional services team has some level of responsibility. There is overall project management at a minimum, but also likely some role in design, configuration, testing, and training as well (see "Understanding Roles and Responsibilities" on the right). Understanding their role, the vendors' role and your role in implementation is one of the keys to success. The project manager is the point person to ensure that the project stays on track and addresses the needs defined. This person should have the right level of experience — with the products and environment you have — to anticipate issues and risks and mitigate the problems before they happen. The project manager should also be an excellent communicator, both with their team (including the vendor resources, if involved) and with

► Understanding Roles and Responsibilities

Who is responsible and accountable for what? Ask bidders to specifically state who has these important roles in the proposed solution approach, identifying lead roles versus contributing roles. Make sure they specify if you, the customer, have responsibility for any of these roles. For example, you may have to install the hardware and/or software with some solutions. Also, if you are asking for a diverse suite of products that may include different vendors behind them (e.g., Avaya for the core system and Nice for performance tools), make sure they specifically address the different roles for different products. It could be the distributor handles the core products (because perhaps they deal with them every day) but relies on the vendor for specialty products.

HERE ARE KEY ROLES TO CONSIDER:

- > Project Management
- > Hardware Installation
- > Software Installation
- > Design
- > Development/Configuration
- > Testing
- > Training
- > Cutover support (or immediately following)
- > Maintenance/Support — remote Tier 1
- > Maintenance/Support — remote Tier 2
- > Maintenance/Support — remote Tier 3
- > Maintenance/Support — on site
- > Support — configuration changes (e.g., custom reports, routing changes)

yours. They will bring in design engineers, trainers and others to support your implementation effectively.

Support may or may not involve the distributor. Oftentimes the vendor provides direct support, but it may be only for the higher levels. Larger distributors are more likely to have their own support resources and more direct access to the vendors. Support for specialized systems often comes from the vendor. It is important to understand if you will have direct access

▶ Sample Evaluation Criteria

When evaluating a technology solution today, there is much more to the decision than completing a checklist of features and functions. In fact, it is likely that many features and functions will be quite comparable between vendors. Don't get bogged down in comparing hundreds of features and functions. Rather, focus on the key things that matter to your environment, and go beyond the things all the vendors provide. This approach will also help you get a more focused proposal; the last thing you want is a 500-page proposal laden with boilerplate descriptions of generic features.

Below is a starter list of things to consider when defining what really matters in your evaluation process. The list will ensure that you focus on what you need from both the product and the "partner" — whether vendor or distributor.

- > Critical Features and Functions
 - Define the ones that really matter to you and will differentiate the bidders
- > Architecture/Technical Fit
 - With current environment and planned environment
- > Ease of use
 - For end users and support functions (including telecom/IT and business analysts)
- > Implementation experience and expertise
- > Support experience and expertise
- > Vendor/Distributor Fit
 - Offerings, vision and direction aligned
- > Cost or total cost of ownership (TCO)

to the vendor. Or, if the distributor is a middleman, you'll need to know the role it plays and the value it adds.

Distributors are the customer's advocate during and after the sale. They will go to the vendor to seek the right discount for the size of the opportunity, the strategic value of the account, and the competitive situation. They will also go to the vendor to get the right resources involved for any issues that come up or aren't being addressed effectively in implementation or support.

In implementation, generally they are the ones who are ultimately accountable for delivery on what was promised in the bid.

KEY CHARACTERISTICS TO LOOK FOR IN A DISTRIBUTOR

Given the realities of the market and importance of the distributor, how do you find the right one for your project? First, start by developing a key set of criteria of what you are looking for based on your project scope, goals and business

objectives, as well as your company's environment and characteristics. Use a simple mechanism to identify and filter the potential suppliers and hone in on the right one for any given vendor(s). You can start by getting lists of distributors off many of the vendors' Web sites, or call the vendors to ask them for potential distributors. Then, depending on how many you think qualify based on the information available, use a phone interview process, or a mini-request for information (RFI) to gather key information and compare options. This approach ensures you get the information you need to pick a bidder that is a good fit without spending a lot of time.

Some of the key criteria to consider are:

> **CALL CENTER FOCUS.** If you have a mission critical call center, chances are you will need a distributor that spends their time in call centers, not just doing PBX sales and implementations. Explore their history, the resources they have (e.g., experience in call centers, number of people that focus on call centers), and how much of their business is from call centers.

> **RELATIONSHIP WITH THE VENDORS.** Many of the vendors rate or categorize their distribution partners. Ask what level they are, and what that means to them and to you. Depending on the vendor, these labels may have implications for discount levels the distributor can get and the amount and type of support readily available (e.g., dedicated resources or shared pools, levels of resources). They generally indicate something about the amount of business they do together, or the types of business.

> **RELATIONSHIP WITH YOU.** While the distributor's relationship with their vendor partners is critical,

their relationship with you is vital as well. If you have an existing valued relationship, a good starting point is to see if the distributor can meet the other needs for your current procurement. If you are building a new relationship, make sure that part of the due diligence on any prospective partners is to assess their approach to working with their customers and how they ensure the products purchased are effectively

tributor has experience in your vertical market, or in centers of your size, characteristics or key operational or functional roles. For example, if you need outbound as well as inbound capabilities, you might want to probe how often they work with outbound centers. If you feel knowledge of your market is important so they can be a good partner in call flow design or identifying self service opportunities, explore their

and other performance tools such as eLearning, scorecards, analytics, and customer satisfaction surveys to find the distributor that offers everything you need.

> **ROLES AND RESPONSIBILITIES AND IMPLICATIONS.** As noted previously, the distributor's role can vary. It may be important to understand that role and probe who does what at the various stages (sales, implementation, and support). Most importantly, you may want to explore how the "handoffs" work — whether within the distributor's environment, or to the vendor — between various stages and teams assigned to the project/account.

> **TIMELINE.** A good prequalifier for a bidder can be whether or not they can live with your timeline — whether it is aggressive or drawn out. Vendors and distributors today can be so busy that they pick and choose the opportunities they will pursue. Ask if that distributor can support your timeline.

AVOID THE RISKS OF A BAD FIT

It's easy to get excited about new products and exciting features and capabilities. It's not so easy to get excited about a distributor. After all, don't they just want to sell you something? But the reality is that in today's marketplace, the people selling, delivering, and supporting your system can make or break a project. It also may be the place where your most important relationships develop. Spend time on the match of that potential partner as much as you would consider the match of that potential product.

A bad fit has many risks. You could get a non-competitive bid, one that doesn't offer you the discounts your scenario deserves, or one that the fit of the product is clouded by the lack of fit with the

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applied to business needs. User groups and references are excellent resources to test these waters.

> **SIZE.** Size does matter when it comes to distributors, but big is not always better. Alignment with your size might be the best indicator. If you are a small center, you risk being ignored by a big player that likes to get big deals. If you are a large, multisite center, you risk overwhelming a smaller company. Find someone that can give you the proper focus and attention for your size and needs.

> **LOCATION,** location, location... may or may not matter to you. At a minimum, the distributor needs to serve the territory where your center(s) are located. Some people get comfort in knowing the people who service the account for sales, implementation or support aren't too far away. If you are multisite, you want to make sure they have the geographic coverage to match. Some distributors are local or regional, while others have a national footprint.

> **OTHER DEMOGRAPHICS.** You may want to investigate whether a dis-

tributor has experience in those areas as well.

> **OTHER VENDOR PARTNERS OR EXCLUSIVE.** Some distributors are exclusive and focus on one vendor for core systems. Others offer multiple platforms. You may or may not care, but if they offer multiple platforms you should at least understand their approach: when do they offer what, how do they decide, will they decide for you, how often do they bid the system of interest, what percent of their resources focus on the vendor of interest? It would be unfortunate to expect a bid from them for one vendor and then because they decide something else is a better fit (or a better margin!), you're left without a bid on a product you wanted to consider. If you want the best "experts" in a given product, exclusivity may give you more assurance you will get what you want.

> **BREADTH OF SOLUTIONS OFFERED.** If you are conducting an evaluation of a suite or multiple technologies, it is critical to understand the overall solution offerings from a distributor. You might probe their offerings for ACD, CTI, IVR, QM/logging, WFM

people supplying it. With the wrong distributor, you may not get the attention you need or get someone who knows some parts of the solution but not others. And in the worst case, you could get a team that lacks the experience you need to succeed. Spending the time to evaluate distributors will help you avoid these risks and find the right partner for your needs. ●



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