



# **TECHNOLOGY OPTIMIZATION FOR TODAY'S CONTACT CENTERS**

**BY  
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## INTRODUCTION

We have a wealth of technology in the contact center, but companies frequently underutilize it or poorly apply it to business needs. Now is a great time to review your deployments and find ways to optimize their business value – through technology, process, and/or people changes.

## ROUTING AND SKILLS

Many elements play a role in routing, including the network, IVR, ACD, and potentially CTI and databases. Centers need to review or define a call path carefully, end-to-end, to apply the technology properly. Skills capabilities allow agents to handle various call types and priorities, and conditional routing makes "if...then..." decisions for each call. Most centers focus on phone calls, but also "route" emails and perhaps fax, mail, or even text chat as part of contact handling. So as we look at routing and skills, we also need to consider it across media.

Many problems in contact centers are due to overly complicated routing and skills. Making skill structures too granular makes it difficult to effectively route, track, manage, and optimize. It puts customers through needless gyrations to call different numbers, navigate prompts, and bounce around queues. "Command center" staff move calls and/or agents around to try to match resources to workload, rather than letting the technology work on their behalf. And in the end, callers often end up in the same place in spite of all these efforts. At the other end of the spectrum, some centers suffer from overly simplified routing and skills. They put everyone into one bucket and expect their "super agents" to do it all. They wind up with a high transfer rate and low first call resolution.

Each center needs to strike the right balance, applying technology effectively to meet business needs. Here are some tips to optimize your routing and skills:

1. **Keep it simple.** Define end-to-end routing with the customer in mind and ease of management as a complimentary goal. Define channel use (toll free numbers) and prompts (whether in the network, IVR, and/or ACD) carefully to match skills while minimizing the burden on the customer. Define skills only to the degree needed for the call types - not for tracking, not because you *can* break it down that much. Finally, define routing paths with the right conditional options but not too many gyrations. You don't want "spaghetti routing" where you can't decipher what goes where (and why) or what works and what doesn't.
2. **Use the technology.** Set up appropriate conditionals and skills to find the best available resource – including looking at backup skills or other sites. Use a routing tool for email – whether it's a function of your ACD or CTI, or a separate email routing engine. You've got to be able to route, track, and optimize more than just phone calls.
3. **Make changes when necessary, and with purpose and understanding.** Part of getting routing and skills right is continuous improvement; few environments are truly static. Use your reports to monitor results, and analyze, assess, and optimize based on what you learn. (Stay tuned for our next column which will address reports)
4. **Tie routing and skills technology into the process and people aspects as well.** Training is key to aligning skills and contact types. You can use routing and skills to help define career paths and create opportunities – across products, customer types, media, or other dimensions.

## REPORTING

If I were to poll a cross-section of call center leaders, I'd probably find a love-hate relationship with reporting software. They love the technology for cranking out tons of data and reports. But they're not crazy about how difficult it is to find the meaningful information among all that data. Since reporting is the key tool for assessing the health of the center and identifying areas for improvement, and one nearly every center invests in, let's talk about how to get the most out of that investment.

First, I hear and appreciate the frustration with many vendor reporting packages. One hundred or more standard reports can be overwhelming. It's tempting to provide access to lots of reports for fear that a useful insight might otherwise be lost. It's equally tempting to avoid the overload by using a few reports for a few simple things or worse, the wrong things, thus missing the opportunity to create focus on the business goals. Apparently the strongest temptation, because we see it so often, is dumping data into Excel or Access, presumably to get it into a manageable form in a familiar tool. The latter may "work," but it's not a good long-term strategy.

It pains me to see clients spend tens if not hundreds of thousands of dollars on management reporting packages to accompany their routing and skills capabilities, and then deploy small armies to manipulate data in spreadsheets. Beyond the obvious hit to the bottom line, it's a time-intensive, error-prone coping mechanism that doesn't scale. The mysteries of these one-off reports result in second-guessing and data distrust, and sometimes independent calculations that reap different results. Heaven forbid one report (which we've even heard referred to by the author's name, such as the "Bob Report") from one data manipulation guru – I mean analyst – says something different about a crucial performance indicator than another report.

I'm also concerned about folks who focus almost exclusively on historical reports and the "I know what happened" explanation that comes with it. Real-time reports offer the possibility of doing something about what is happening, addressing key performance requirements such as Service Level. Reports aren't meant to be yesterday's news. They are calls to action – both tactical and strategic.

Here are some actions you can take to optimize reporting technology and its application in the center:

1. Define a metrics strategy to focus on the right key performance indicators for your business and operational goals. Then specify what information should go to whom, how often, in what form, via what channel. Create a consistent focus across the organization and use reporting to reinforce and optimize performance.
2. Create a business analyst role to maximize the value you get from your real-time and historical reports. Define "triggers" to address performance issues in real-time along with appropriate action plans. Use trending and analysis to define strategic changes in processes, staffing, technology use, and more. Work with routing and skills analysts, quality monitoring staff, training, and IT to institute changes and track results.
3. Use the systems on which you've spent the big bucks. Invest in training so your people know how to use the tools and customize only when necessary. Make sure your front line supervisors and managers work effectively with the information they receive. And help CSRs understand how the information can help them balance productivity with quality service to the customer.
4. Define governance for report creation and distribution to avoid becoming slaves to the system and constantly creating unique, little used reports. Have a business reason for creating new reports, adding new metrics (more is not always better), and distributing more information to more people.

## SCORECARDS AND DASHBOARDS

Scorecards and dashboards present a tremendous opportunity to focus everyone in the contact center on what truly matters to the business. In the best case, the technology and associated processes operate like a nervous system, sensing and reporting key information about the current environment and stimulating coordinated action by all affected parts. In the worst case, they fire off the wrong responses, overwhelm the receptors with too much information, fail to warn of impending danger, or some combination of all three. There's no doubt about it: It makes good sense to give thoughtful consideration to the design, presentation, and use of this technology.

Whether built in-house or purchased off-the-shelf, scorecards and dashboards provide a snapshot of performance for the organization, teams, and individuals. In their most basic form, they provide daily, weekly, and/or monthly views of key metrics, as well as real-time displays for selected operating statistics. Higher end solutions use color coding to compare actual performance to targets and highlight trends. They equip users to slice and dice the data and/or drill down for additional detail. And analysts, team leaders, supervisors, and CSRs get custom views on their desktops tailored to their specific needs.

As cool as they are, scorecards and dashboards can get muddled up by technology, process, and people issues. Home-grown solutions fall prey to the too-much-of-a-good-thing syndrome in which more and more data gets crammed onto scorecards with little regard to the stats that really matter. And with the high risk of human error that comes with this kind of reporting, unsuspecting users may get too-much-of-a-bad-thing! Vendor tools have their own Achilles heel: poorly applied bells and whistles due to lack of strategy and context. No matter who does the development, some common threats are:

- Poorly defined Key Performance Indicators (KPIs) which lack context within business strategy
- Limited diversity in the scorecard data – mostly repackaged ACD stats, perhaps with a dash of QM – which fails to account for voice of the customer, IVR performance, schedule adherence, cost/revenue numbers, and other KPIs.
- Too many KPIs (“Just measure them all!”) and/or conflicting KPIs with little concern for how the data drives – or fails to drive – performance.
- General confusion by the team about what the metrics mean, why they’re important, and what the team should do about them, compounded by an absence of coaching to stimulate peak performance.

If these pain points sound familiar and you’ve got a hankering to enhance your operational nervous system, here are some suggestions for optimizing your scorecard and dashboard technology and its application in the center:

1. Develop a metrics strategy tailored to your primary business objectives such as revenue generation, cost control/efficiency, or relationship building. Identify a few targeted KPIs that have particular relevance to your objectives. Measure staff productivity across all media and the efficacy of customer-facing technologies such as IVR. Distinguish between metrics with specific targets and those to simply monitor for trends and anomalies. Finally, define who gets what, with what frequency, and through which media. As shown in Figure 1, a good strategy provides folks in the trenches with frequent, granular data, while senior management’s role is to understand the “big picture” and resist temptation to dive into the weeds. A strategy provides the focus and alignment everyone needs to do their part.
2. Choose the *right* data from the *right* sources to create a balanced view of the center’s performance, along with each individual’s contribution to the collective. Paint a comprehensive picture, but don’t inundate the viewers with too much information.
3. Take time to educate the team on the metrics strategy and how it relates to the center’s business objectives. Communicate how and why the metrics were chosen, what they mean to the center and the individual, and how they’ll be used to monitor and enhance the team’s performance.
4. Create business processes to specify who does what under what circumstances with information provided on scorecards. Address real-time operational protocols to meet critical metrics such as service level. Provide opportunities for feedback, coaching, and personal development to help individuals raise their skills and competencies. Note trends and root causes that affect the whole organization and engage the training, IT, and process optimization folks to launch performance improvement initiatives. Use results to recognize individual and team successes.

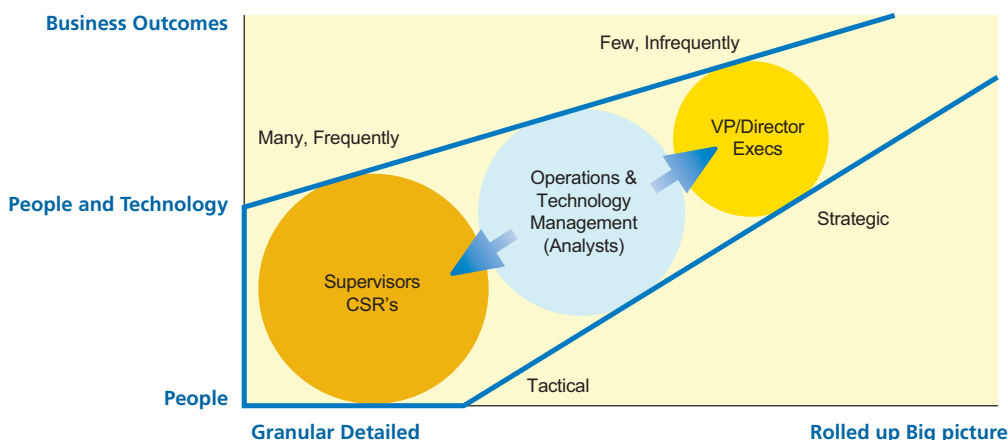


Figure 1: Each function has a different role in using performance data

## WORKFORCE MANAGEMENT

When I scout for the potential to hit a technology optimization home run, Workforce Management (WFM) comes to mind immediately. Its capacity to forecast, schedule, and track the overwhelmingly largest line item cost in your center (your staff!) certainly warrants a place in the starting line-up. Perhaps it hasn't had the best batting average over the years, but the right investment in time, resource, process development, and coaching could turn it into a star hitter.

WFM gets at the heart of a goal for every center: use resources wisely to provide good (if not excellent) service to customers. Labor comprises two-thirds to three-quarters of a center's operating budget. WFM projects workloads and produces staff schedules – monthly, weekly, daily, hourly, quarter-hourly – that provide consistent service to customers while managing labor costs. As powerful as this tool can be, we see common themes that challenge its use:

- Despite a wide range of solutions (functionality and costs), centers don't do a good job aligning their requirements, their ability to forecast, and their scheduling flexibility with the capabilities of their system. We see home-grown solutions or low-end tools where a robust solution is needed. And we find \$100,000+ systems doing work that a good spreadsheet could do.
- New WFM staff are required to fill the cleats of their predecessors without the benefit of spring training. A few enterprising players might figure out how to make the system work. Most simply get by with barebones familiarity and a bunch of home-grown spreadsheets in their back pockets. *[If I had a nickel for every forecast or schedule I've seen in Excel...]*
- Thinking WFM can run on auto-pilot once it's set up, management doesn't invest the time and resources to use the system effectively for real-time management, ongoing analysis and workforce optimization.
- WFM analysts and supervisors lack the processes and/or incentives to collaborate that ensure schedule adherence and effective adjustments when events deviate from projections.
- Tied to all of the above, the organization lacks understanding of the importance and role of WFM and its connection to business goals and defined performance objectives.

Here are some actions to take to optimize WFM technology and its application in the center:

1. If you have a WFM system, assess your needs and look at what you're doing – and how you're doing it – to address them. Create a WFM role, if you haven't done so already. Get training for analysts, and set up processes from end-to-end to handle forecasting, scheduling, tracking, and real-time monitoring, with defined action plans. Restart your current system, or go find one that is a better fit if you must. It's OK if some things need to happen outside WFM. Just make sure there's a legitimate business reason for doing it, not an overwhelming impulse to invent your own wheel. Supplementary models occur most often with unusually complex forecasting requirements based on business drivers, financial analysis, or "what if" scenarios for options and tradeoffs.
2. If you don't have a system, look at your requirements. What is the nature of your volume? Is it dynamic or static? What are your hours of operation? How much flexibility do you have in scheduling, across how many shifts? How many ancillary things do you need to schedule (e.g., breaks, lunch, training, team meetings, etc.)? Once you've answered these questions, think carefully about the processes and tools you'll need to forecast and staff effectively, and pursue the right system to support your vision. Then follow the other advice in Step 1.
3. Make sure that the folks with oversight of WFM are accountable to the folks who have responsibility for the center's performance, and that there are defined processes between the two. Supervisors need to ensure the right resources are in place at the right time. WFM analysts need to be plugged into what is happening in the center and what needs to be done about it. Educate all front-line staff on things like service level, adherence, Key Performance Indicators, and their role in ensuring the center achieves its KPIs. Tie the success of the WFM analysts to the success of the front-line.

## QUALITY MONITORING

Try this analogy: Compare quality monitoring in your center to differing approaches to health management. One model awaits the presence of symptoms before bringing specialists into action to treat the disease. The other promotes health proactively for the whole body as a means to ward off problems. I'm all for the latter when it comes to maintaining my own health, and the health of a contact center. If you agree, you'll see quality assurance (QA) is just what the doctor ordered. A good process with appropriate resources for execution is essential, but technology is the enabler that gets the job done right.

Quality Monitoring (QM) tools help centers meet performance objectives, ensure consistent contact handling and process adherence, and optimize operations. Solutions are available to serve all sizes, levels of sophistication, and business goals. The spotlight tends to shine on products with full-fledged multimedia capabilities integrated in a suite with other performance tools, such as speech analytics, eLearning, and workforce management. Yet there are plenty of affordable options for resource-constrained operations, including low-cost desktop recording devices. Whatever option fits your budget, QM is more than a personal coaching tool for individual representatives. It's also a means to judge and optimize the performance of the "whole body."

To their credit, most centers use QM tools in some form or fashion. As powerful as these tools can be, I've seen common themes that challenge their effectiveness:

- QM program designers do not align scorecard elements with business goals and key performance indicators. They don't customize metrics to account for call types and channel differences.
- The QM tool only captures the audio portion of the call, rendering the reviewer blind to how the representative navigated the applications. Chat and email interactions are ignored altogether.
- Centers don't establish – or stick to – sampling targets for recording and review (e.g., 5-10 calls per rep per month).
- Service representatives don't receive feedback and coaching in a timely manner.
- Scores are tabulated manually using our old friend, Excel. The "reports" don't capture trends nor provide thoughtful analysis of what the scores, individual coaching sessions, and trends reveal about the "big picture." They don't suggest initiatives that could optimize the center's performance.
- Centers don't commit the resources to do the job. It's the first thing to go when resources are tight.

Poor design, uneven execution, and questionable reporting cause folks at all levels to distrust the process as subjective and of marginal value. If you're game to champion a wellness campaign, here are some proven remedies to optimize QM technology and its application in the center, ensuring objective use of data for individuals and the organization:

1. **Create well-defined processes end-to-end and execute them consistently.** Include scoring, calibration, reporting, trending, and feeding QM data into scorecards in these processes. Provide individual feedback in coaching sessions with specific actions for improvement. Use representative "best practices" calls to reinforce training principles and recognize excellence in service.
2. **Extend your vision beyond individual scoring and feedback.** Think of QM as a key mechanism for promoting operational efficiency and competitive differentiation. Use your results to identify organization-wide improvements, such as training additions/changes, system enhancements (e.g., user interface, screen layout), and process improvements. That's where the big bang for your QM buck lies.
3. **Take a holistic view of quality assurance.** Capture voice and data and monitor all forms of contact. Screen capture shows how your reps use your systems and what they're really doing when they put people on hold. The growth in use of other media suggests a need to include them in the QA process.
4. **Integrate QM scoring with other performance tools.** Use your workforce management system to decide when to score calls and when to provide feedback. Leverage eLearning to trigger action based on QA scores. Link your QA assessments with your customer satisfaction surveys to bring an external perspective to balance with your internal views. And when you're ready to take the next step, build in speech analytics capability to add further value to your recordings and depth to the learning you glean from them.

## INTERACTIVE VOICE RESPONSE

My friends and family love to tell me their latest miserable customer interaction experiences, and I bet yours do too. I'd also bet that when you meet new people and they ask you what you do, you have a bit of pride as you explain your role in servicing customers, but then you brace yourself for their response. More often than not, your new acquaintance will offer an animated account of a recent IVR horror story. Of course the good news is you can readily share your favorite nightmare, and are quickly fast friends with something in common. The bad news is they want you to fix all those bad systems out there or make them go away. It's time IVR stopped being a conversation piece and started being a centerpiece of service excellence.

IVR is the doorway into your business. Your prompts, menus, requests for identifying information, and self-service offerings may form your customers' first – and lasting – impressions. What does your IVR application say about your company? Do you hold the door open with a warm and welcoming invitation, or do you send customers down a dark, narrow hallway before they can come into your business, and then ask them, "Who are you and what are you doing here?" Here are a few factors common to inductees into the IVR Hall of Shame:

- Wordy prompts with too many choices (and the worst scenario – choices out of order!... to do X, press 7, to do Y, press 4...)
- Menu options that "dead end" and offer no way out
- No confirmation to assure callers that their transactions were completed successfully (and therefore assuring they want to talk to someone anyway!)
- Uneven voice quality and volume, with multiple voices
- Requests for information that callers must repeat when they (finally) reach a service representative
- Touch tone applications that are much too complicated, and should either be done via Automated Speech Response (ASR) or left to web or live agent interactions
- ASR with low accuracy rates, inducing callers to shout their responses into the phone and beg for human interaction
- Inadequate reporting and analysis to understand how callers interact with the application and where improvements could be made

If you want to improve containment rates and inflict less pain and suffering on your customers – and actually welcome them into your business – here are some things you can do to optimize IVR technology and its application in the center:

1. Get your hands on a set of IVR best practices (just do a quick search and you'll find many) and use them to audit your applications. You can assign this as a special project, or ask your CSRs to chip in during lulls in contact center activity. If you've got the budget, hire an expert to guide your assessment and design changes. Document "quick hit" fixes – e.g., establish consistent navigation, refine scripts, remove unnecessary prompts or self service applications, remove dead ends, re-record using professional voice talent in a studio. Then find a way to make those changes happen soon.
2. Set up a routine optimization plan. Make frequent calls into the system to assess performance. Develop a quality review protocol for IVR calls to hear how customers interact with and react to your system. Ask CSRs about the feedback they receive from customers. Summarize findings for quarterly reviews with IVR stakeholders (contact center, IT, and perhaps business units and marketing). Discuss what's working and what needs to change and build and execute action plans accordingly.
3. Identify new applications that could reduce call volumes and build the business case for their implementation. Here are some key factors to consider with new applications:
  - As you plan for new applications, give careful consideration regarding when to use touch tone and when to use ASR for your user interface. Focus on the user needs, expectations, and demographics. And keep in mind you may need to offer both.
  - Include a plan for integrating IVR with your other contact center technologies if you don't already. Bring an expert on board to help with design. [You don't do yourself any favors by pinching pennies here!]
  - Do lots of usability testing with real customers and incorporate their feedback into the design before you go into production.
  - Build proper reporting capabilities into your designs and use them to analyze and optimize your applications.



## COMPUTER TELEPHONY INTEGRATION

Computer Telephony Integration (often equated to "screen pops") has long been on every center's wish list, promising to shave seconds off every call and improve customer service. For many, it has been the elusive technology they could never afford. For others, it's the investment that fell short on benefits and long on costs. If we take a look at why, I think you will learn some things that help you get more out of what you have, or what you are planning for, to drive both savings and improved service.

For those who fall into the "could never have" or "don't have" categories, CTI seems cost-prohibitive, overly complex, and/or too much trouble to find the right solution. In a worst case scenario, some wound up with "shelfware" after a failed implementation. Others suffered a breakdown in the "I" of CTI – perhaps after an upgrade to one component – and the systems stopped talking to each other. If CTI is not delivering high benefits, keeping it running is not a high priority.

For those who fall into the "short on benefits and long on costs" category, CTI is a disappointment. While CTI can pop screens and save time, the value depends on having a good way to identify customers, a high likelihood of matching that identifier in the database, and a good screen to pop. For many, there really is no good identifier, meeting all the criteria from both a customer and company perspective. Or, the identifier has a low "hit rate" in the database. For example, phone numbers are a customer-friendly identifier, but the database may not be up to date. And in a world with home phones, cell phones, and work phones, how can the company keep up? Even for folks who navigate this challenge successfully, the "popped" screen has to be more than a weigh station before heading to 14 other screens in six non-integrated applications, forcing re-entry of customer data after all.

Several years ago, I wrote that I wished the acronym CTI would go away. It's confusing because to many it means only screen pops, but the technology can do so much more. Unfortunately, few do more with it – and therein lies another reason for poor cost-benefit results. If you only pop screens, you miss the opportunity to do sophisticated routing, such as multimedia, multi-site, and data-directed routing based on information stored in your database. Perhaps you have outbound dialing requirements, or should provide coordinated voice/data transfers and conferences. And almost every center could benefit from better reporting, including "cradle to grave" call tracking and information that ties outcomes to contact handling. Maybe a softphone that puts agent controls for login/logout, workstate changes, and performance statistics on the desktop would be a time saver and performance enhancer. All too often, these "CTI" capabilities aren't planned or implemented.

In spite of its challenges, there are ways to optimize CTI technology and its application in the center, whether you have it today or are planning for it tomorrow:

1. If you don't have it and can't afford it right now, look at ways you can implement a "poor man's" version. See if you can display information on the phone, or "whisper" it to the agent prior to connecting the call. While these options aren't as sexy as a screen pop, they deliver some savings while improving the customer experience.
2. If you do have CTI and it performs poorly, conduct an audit and define actions to improve performance. For example, if you have a low database match on screen pops, see if there are ways you can update your records. Some centers contract with third party services to update phone numbers. Others ask reps to update customer info on every call, investing a little to save a lot. Look at end-to-end integration between your ACD, IVR, CTI, and desktop applications. And make sure your processes don't compromise payback – for example, requiring customers to confirm information they provided and the CSR received. An audit will help you identify and address these (mis)steps.
3. If all you are doing with your CTI is popping screens, look into the licensing fees and integration required to support added functionality that may benefit your business, such as outbound calling and data directed routing. Or, look at ways to optimize the desktop to streamline the call process.
4. If you don't have CTI yet, start looking at low cost ways to implement CTI; the market offers options today. Talk to vendors about their strategies and solutions to help you achieve your business goals at an affordable price. Consider Session Initiation Protocol (SIP), bundled capabilities, and less complex, lower cost CTI software. High functioning and high value CTI doesn't have to be out of reach for your center and your customers.

## CUSTOMER RELATIONSHIP MANAGEMENT

Customer Relationship Management (CRM) has held great promise for over a decade. By consolidating customer information and interaction history in a central repository, employees in different roles and departments would get a complete picture of their organization's relationship with each customer. It was supposed to be a win-win scenario – heightened efficiency and effectiveness for the company with a corresponding improvement in the customer experience. All too often, poor execution, inattention to functional and/or interface requirements for real-time interactions, and stale content and workflows turned the call center's symphony of benefits into a band of sour notes. The net result: many reps treat CRM as a burden and avoid using it. CRM is too important to relegate it to nuisance status. If you have an underutilized CRM, it's time for a restart. If you haven't got CRM, it's time to learn from your predecessors' mistakes and apply "best practices" when you're ready to leverage this powerful technology.

CRM comes in many forms – home-grown, premise-based, and more recently, hosted or Software as a Service. Although "CRM nirvana" is an enterprise-wide tool, the challenge of getting all of the data, processes, and organizational elements aligned to leverage the technology can be overwhelming. So the starting point for a useful solution is figuring out where and how the "80-20 rule" fits in your environment. Project scope must reflect a clear sense of the business strategy, a concrete statement of what the company will achieve, and an action plan that incorporates people and process elements alongside technology deployment. If you're long on technology and short on strategy, people, and process, you are asking for trouble.

Here are some examples of "typical" CRM issues:

- If CRM isn't aligned with the call center's workflow, it is seen as more of a hindrance than a help in servicing and selling to customers. IT blames the call center for its process issues, and the call center blames IT for poor technology deployment. In many cases, the problem may boil down to the need for change management.
- The "we're different" mindset leads folks down the path of building a highly customized solution rather than working with best practices-based tools. They wind up creating a monster that can no longer evolve, get support, or weather a vendor upgrade.
- Makeshift solutions and processes crop up when system designers lack an understanding of the customer life cycle, the role of each organizational group in that life cycle, and the processes required to ensure end-to-end support through customer identification, attraction, acquisition, and optimization (or marketing, sales, and service). The resulting inefficiency and errors diminish the project's ROI.
- Call centers may adopt a view of CRM that is too narrow and build an isolated tool that only shows part of the picture. Crucial data about customers and interactions either don't exist or are inaccessible. The nightmare scenario is multiple incompatible CRM solutions each housing part of the story – marketing, product group, field sales, branches, billing/accounting, fulfillment, etc.
- CRM suffers a chronic lack of resources (people!) to keep it "alive" through ongoing data capture, workflow updates, reporting and analysis, and use (processes!). In a fast-paced world, the exciting new technology can look old and out of date in a matter of months.

Whether you have a home-grown CRM, premise-based CRM, or hosted CRM, chances are you can get more value out of the solution for your center. And if you are embarking on a CRM journey, keep these "best practices" in mind.

1. Start with vision and strategy. Define CRM's role and ensure that your deployment supports that role across marketing, sales, and service. Build CRM around the customer life cycle and consider the call center's role in each step of that life cycle. This mindset will force a focus on customer interactions and experience. Consider the enterprise view, if possible. Build strategy and plans for the call center with an eye toward its interactions with the rest of the organization.
2. Don't focus just on the technology. Define processes and allocate resources to get value from technology. Process elements include initial workflow definitions and processes to review and revise workflows. Define and align the people elements – such as organizational roles and responsibilities – with the process plans.
3. Keep in mind that CRM is never "done." It needs to evolve to respond to business needs and react to business outcomes. Success in ongoing application requires IT and business collaboration.
4. Configure the technology, don't customize. That way you leverage best practices while applying the tool to your environment, and that tool can continue to evolve with your business needs and the product's capabilities.