



Technology Checklists

Use these lists to trigger your thinking when developing requirements.

Feature and Function considerations for each major technology

1. Core ACD
 - Queuing
 - Work states (e.g., types of unavailable states)
 - Call treatment (messages in queue, music on hold)
 - Desktop options (hard phone, soft phone)
 - Call codes
 - Auto greetings
 - Auto available/manual available
 - Auto answer (zip tone)/manual answer (ringing)
 - Service observing (live monitoring)
 - IP or TDM
 - Phone protocols (e.g., SIP, proprietary)
 - Virtualization
 - Home agents
 - Satellite offices
 - DRP/BCP capabilities
2. Routing
 - Single site
 - Multisite
 - Multimedia
 - Email
 - Text chat
 - Web calls
 - Outbound
 - Voice mail
 - Blended queue
 - Conditional routing
 - Prompting (caller entered digits)
 - Skills based routing
 - Data directed routing
 - Predictive algorithms
 - Outbound calling
 - Predictive
 - Preview
 - Progressive
 - User interface for developing routing paths
3. Reporting
 - Real-time reports
 - Historical reports
 - Report categories
 - DNIS/pointer number
 - Routing path/table
 - Site



- Group/team
 - Skill
 - Agent
 - Trunk
 - Scheduling reports
 - Graphical reports
 - Report customization
 - Supervisor tools
 - Desktop tools for CSRs (e.g., displays, buttons, softphones, ticker tapes)
 - Wallboards/readerboards
 - User interface for viewing and creating reports
4. Quality Monitoring
- Random, scheduled, on-demand recordings
 - “Business rules” to define numbers and types of calls to capture
 - Line side, trunk side, IP interface, service observing to record
 - IP or TDM
 - Capture voice and data (CTI)
 - Hot seating (shared desks)
 - Customizable scorecards
 - Reports
 - Templates
 - Customization
 - Trending and comparisons (calibration)
 - User interface for administration - scoring, viewing and creating reports
 - User profiles and security (administrator, supervisor, CSR)
5. Logging/Call Recording
- Record all calls
 - “Business rules” to define types of calls to record
 - Recording on demand from desktop
 - Line side, trunk side, IP interface to record
 - IP or TDM
 - Data automatically captured
 - CTI to capture more data
 - Hot seating (shared desks)
 - Search functions
 - Playback options
 - Phone
 - LAN
 - Data storage options
 - Interface to open storage
 - “Intelligence” or mining capabilities (speech analytics)
 - Text-based
 - Speech-based
 - User interface for administration - searching, analyzing, reviewing, reporting
6. Speech Analytics
- Search methodology
 - Business rules for queries/analytics
 - Tools for rules building, testing, optimizing
 - Reporting
 - Canned, compliance, real-time, scheduled, customized, exceptions, etc.



- Filter/drill down
- Technical characteristics
 - Volume
 - Timeframe
 - Speed
 - Accuracy
- 7. Workforce management
 - Forecasting
 - Rostering
 - Scheduling
 - Tracking
 - Skills simulation
 - Reporting
 - Templates
 - Customization
 - Multimedia support
 - Email
 - Text chat
 - Multisite
 - Real-time adherence
 - Link to payroll
 - Vacation scheduling
 - Shift bidding
 - “What if” scenarios
 - User interface for administration
 - User interface for CSRs/Supervisor requests and view
- 8. Performance Optimization/Scorecards/Dashboards
 - Integration with various data sources
 - ACD, WFM, CRM, QM, IVR, CTI, etc.
 - Scorecard tools
 - Defining KPIs
 - Configurability
 - Different user levels
 - Reports
 - Templates
 - Customization
 - Trending
 - Analysis
 - User interface for viewing and creating scorecards and reports
 - Benchmarking data
- 9. eLearning
 - Modules
 - Delivery
 - Integration
- 10. Customer Satisfaction Surveys
 - Media – IVR after call, follow up phone calls, email, postal cards, web, fax
 - Sourcing – in-house, outsourced
 - Survey Targets: All Customers, New Customers, Defecting Customers, Random Sample, Selected



- Reporting/Analysis of results: WHAT gets reported, to WHO, via WHICH media/process
- Ad hoc surveys versus periodical surveys
- Question types
- Response types (e.g., checkboxes, ranking scales, dropdown boxes, essay, open-ended, etc.)
- Survey triggers (e.g., VIP, time-of-day, random, Excessive Time On Hold, etc.)

11. CTI

- Screen pops
 - Transfer
 - Conference
- Routing
 - Skills
 - Multisite
 - Multimedia
 - Data directed
- Reporting
 - Cradle to grave
 - Integrated contact information and business application outcome
- Multimedia routing and reporting
 - Email
 - Text chat
 - Web calls
 - Outbound
 - Voice mail
 - Web collaboration (page pushing, co-browsing)
 - Blended queue
- Softphone, ticker tape, desktop statistics
- Outbound dialing
 - Preview
 - Predictive
 - Power/progressive
 - Blending

12. CRM

- Contact tracking
- Customer profiles
- Business rules/workflows
- Corporate library
 - Document repository
- Sales force automation
 - Opportunity tracking and analysis (leads, win/loss, etc.)
- Service functions
 - Issue tracking and analysis (logging, tracking, escalation, closure, etc.)
- Marketing
 - Campaign management
 - Lead management
 - Event management
- Reports and analytics
 - Contacts
 - Business outcomes
- Scripting
 - Upsell/cross-sell



- Compliance
 - Informational
 - Other
 - Fulfillment
 - Mailings
 - Fax
 - Email
 - Multimedia support
 - Email management
 - Text chat
 - Blended queue
 - Embedded in product or via interface to CTI/Routing/Reporting
 - Web options
 - User interface for end users (sales, service, marketing)
 - User interface for developing business rules, running reports and analytics
13. Knowledge Management
- Authoring and publishing workflows and content
 - Workflow = steps tied to content, users, etc.
 - Creating, editing, publishing, version control
 - Management and maintenance
 - Content updates – recommendations, expiration dates, reviews
 - Workflow analysis
 - Rating analysis
 - User controls
 - Profiles and security (including access, interface, content/input)
 - Channels – differences by access and user type
 - Feedback
 - Surveys, ratings, content recommendations
 - Sophistication levels/options
 - Electronic documentation/library
 - Search functions
 - Case-based system
 - Expert system
 - User interface for end users to find and use knowledge
 - User interface for administering new knowledge
 - User interface for external users via web
 - Integration with CRM, email system, or other tools
14. IVR
- VXML or proprietary application development
 - Versions of standard tools
 - Options for extensions
 - IP or TDM
 - Speech recognition
 - Structured/directed dialog
 - Natural language
 - Text to Speech
 - Voice authentication
 - FAX functions
 - User interface for developing applications, creating grammars
 - Prompt editing tools



- Pre-packaged applications
- Reporting
- 15. Multimedia/web collaboration
 - Email
 - Parsing
 - Auto-acknowledge
 - Auto response
 - Suggest response
 - Libraries
 - Text chat
 - Parsing
 - Auto-acknowledge
 - Auto response
 - Suggest response
 - Libraries
 - Web calls
 - Outbound
 - Voice mail
 - Web collaboration (page pushing, co-browsing)
 - Blended queue
 - See routing
 - See reporting

Technical/Architecture considerations

1. Overall architecture
 - Client/server or browser-based applications
 - Web services or other standard architectures
 - Service Oriented Architecture (SOA)
2. Hardware architecture
 - Any standards or specific hardware platforms
 - Desktop
 - Servers
3. Software architecture
 - Operating system
 - Desktop
 - Servers
 - Databases
 - Development environment
4. Integration tools
 - Standards
 - Interfaces
 - APIs
 - Web services
 - Integration with other systems:
 - Integration to legacy systems
 - CTI integration
 - IVR integration
 - QM integration
 - DB integration



- Etc.
- 5. Scalability
 - Sites
 - Seats
 - Ports
- 6. Management/Administration tools
 - Any standards
- 7. Reliability
 - Architecture
 - Options
- 8. Performance
 - Network
 - Systems
 - Desktop
 - VoIP
 - IVR
 - CTI
 - Etc.
- 9. Security
 - Network
 - Data
- 10. Disaster recovery/Business continuity
 - Across sites
 - Within site

Sourcing considerations

1. Buy vs. Build
2. Best of breed vs. Suite
3. Premise vs. Hosted vs. Managed Services
4. Vendor/distributor roles, responsibilities, relationships