"With potential changes coming from so many angles, sometimes faster than you can react, you may want to throw up your hands and just 'wing it.' But you can plan for change."

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HOW TO HIT A MOVING TARGET

Change is coming at breakneck speeds. Plan with an eye on agility and responsiveness.

By Lori Bocklund, Strategic Contact

By Lori Bocklund
Strategic Contact Inc.

@StratContact

We love to conduct technology strategy projects and have shared how important we think those are for contact centers. We emphasize alignment of technology strategy with operations and business goals. But how do you build a strategic plan when each day brings a new direction from leadership, a new challenge from external forces or internally driven change? In the "go-go" world we live in, I'll make the case that planning is more important than ever, and your biggest technology drivers may be agility and resilience.

The Only Thing Certain Is Change

Change seems to be reaching new heights. Additions, consolidation and moves affect the number of sites. Companies add outsourcers, use existing outsourcers in new ways, or move outsourced activity in-house. Then there is the whole merger and acquisition scramble (see the sidebar, "Merge Ahead"), which can set everyone on edge, whether it is with the vendor that supplies the technology or the company that uses it.

Business changes create needs that technology has to address, such as changes in sales processes to drive more revenue, new product offerings, moving into new geographic areas, new emphasis on compliance, regulations, security or resiliency. Operational changes such as more diverse channels, consolidation or centralization of functions, or new metrics, including hard ones like first-contact resolution (FCR), or overriding ones like Net Promoter Score (NPS), can throw even the most seasoned contact center leaders for a loop. And let's not forget budget changes—particularly cuts that will significantly impact frontline or support staff.

Changes brought on by *enterprise* technology initiatives (e.g., new CIS or CRM) have extensive impact on operations in the contact center and easily ripple into integration or process impacts. Changes in sourcing such as a move to cloud preference for technology, outsourcing or securing managed services for IT or other areas (more on this later) can be huge. And perhaps one of the most feared enterprise changes is what I call "right-hand/left-hand issues." You may not even be aware of some of the moving targets and, as a result, get blindsided by change. In short: Put on your dancing shoes and prepare to move!

Speed Kills

Chances are you are nodding your head at some of these scenarios. I have to add a particular emphasis to change at breakneck speeds, which also seems to be a trend. Speed kills in more than just drugs and driving as it tends to ignore the ability of people to respond. When speed is the number one driver, we see projects fail, transition into something else, and/or end up with an undesirable result despite heroic efforts.

Centers try hard to adapt to change, but many are forced into a path (perhaps not a good one) because of the speed of the change. There is no time for methodical problem-solving or option evaluation. Once a rapid decision has been made, it may change shortly thereafter. One knee-jerk reaction can easily lead to another.

Without a doubt, "Ready, Aim, Fire" works much better than "Ready, Fire, Aim, Fire Again… Wait, we need to get a shotgun…" In reality, little actually gets done in an environment driven by speed. Constant redirection disguises activity as progress, and the troops begin to get restless.

But the risks of speed aren't just at the moment of change. Just like those diets with quick weight loss, people quickly fall back into old habits in the absence of appropriate behavior change and reinforcement, and the pounds come right back. The end result is cynicism about whether things will improve—and stick—when the next initiative hits. So even when urgency seems to be the rule, try to make the case for proper planning and diligence for sustainable change.

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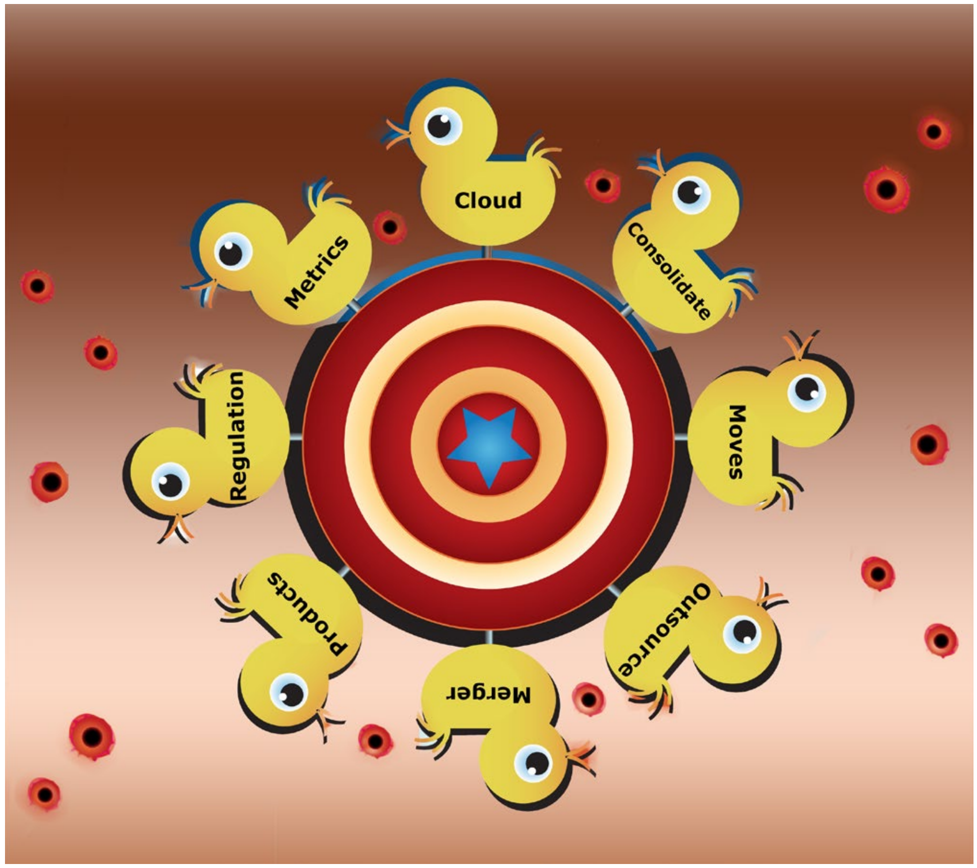


With so Many Changes, You May Feel Under Fire

Planning for Change

So with potential changes coming from so many angles, sometimes faster than you can react, you may want to throw up your hands and just "wing it." But you can plan for change, factoring the most likely events for your business into your technology strategy (see Table 1, *page 4*), and making a case for investment in tools that provide the agility and flexibility you need.

In a perfect world, the contact center is part of the team dealing with any initiatives that might impact customer interactions. You plan reactions when you have weeks or months to prepare, enabling you to do things like stand up additional self-service or change routing within or across sites. You also need to be a "change-ready" organization, able to build in alternatives you can "turn on/off" easily when you must react without warning. Examples are alternate routing paths already configured and ready to repoint numbers, or technology that lets you quickly add staff or leverage reserve staff.

Preparing for super agility with an increasing number of factors requires both strategic planning to have systems, licenses and configurability at the ready, and tactical planning to have the processes and resources ready to implement changes. Involve contact center leadership and staff in planning. Develop detailed process documentation that can be used in structured training yet altered quickly when change requires process adjustments and staff retraining.

Another action is to conduct contingency planning, which is not much different from planning for business continuity and disaster recovery, as well as peak handling. As a bonus of being change ready, you may actually develop or update your BC/DR and peak response capabilities as a side benefit! (See "Leveraging Technology to Optimize Continuity and Recovery," *Pipeline*, October 2014, and "Volume Challenges? Technology Can Help," *Pipeline,* May 2013.)

Include processes to respond to change, along with the technology you need to execute that response. Have IT and contact center support staff ready and available. Keep in mind that the more resource-constrained you are for the day-to-day, the tougher it is to effectively respond to change.

TABLE 1: CHANGES IMPACT IN MANY PLACES, IN MANY WAYS

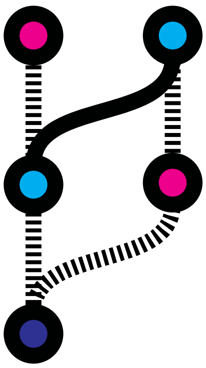
VERTICAL MARKET	EXAMPLES OF CHANGES WITH LEAD TIME	EXAMPLES OF CHANGES WITH LITTLE/NO WARNING
Any	• Mergers/Acquisitions • Security and privacy requirements • Change in sites • Change in use of outsourcer(s) • New channel offerings • Expansion into new markets • Offer new products or services	• Storms, earthquakes, hurricanes or other natural events • Fires or other building impacts • Technology failures • Any of the "lead time" changes where the CC was not involved in planning (and therefore learn of it only when the change is imminent)
Utilities	• Prepare for drought rules and rates • Storm season	• Drought relief (rain!) that changes rules • Outage
Financial Services	• Compliance or regulatory rules	• Major change in market valuation • Major security breach
Healthcare	• ACA, HIPAA or other laws • Enrollment periods • Changes to law that require process or technology change	• Political statements/news about potential changes to laws that create questions/fears
Consumer Goods and Services/Retail and Manufacturing	• Changes in sales channels (e.g., direct, web partners, dealers, retailers, etc.)	• Strike or transportation issues that impact the supply chain • Recalls or major product issues
Insurance	• New regulations	• Storms or other widespread events
Travel/Transportation/ Entertainment	• New loyalty programs	• Weather disruptions
Government/Non-profits	• Legislative changes	• Disasters

If you feel understaffed, as so many do today, you need to have alternate resources you can tap. These include contractors, vendors, VARs, outsourcers and consultants. Put agreements in place (e.g., Master Services Agreements, Retainers, or Time and Materials) so that they are teed up when needed, recognizing they can't hold staff availability for you. Nonetheless, things move faster when the legal and procurement steps are out of the way.

The Impact of Frequent and Rapid Change on Sourcing Strategy

The response of many organizations to the pressures of a moving target is to make it someone else's problem. The rise of hosted or cloud solutions, along with the strength of outsourcing, provide ready options for many and deserve a special mention for the need to include them in strategic planning. Don't view these options as stop gaps or short term; they require planning and strategy, and you should expect to commit to them for three to five years.

Outsourcing requires a time investment to define requirements, find vendor(s) that fit, and negotiate the right statements of work (SOWs) and service level agreements (SLAs) (see "Can't We Just Outsource It?" *Pipeline*, November 2013). Operational implications have technical implications (see "Putting Resources to Work So Your Technology Does, Too!" *Pipeline*, June 2013, and "Technology Implementation Challenges and Best Practices," *Pipeline*, August 2014), so you must define what stays in-house and what the outsourcer will do, what systems they use, and whether and how you will integrate with them. Most outsourcers won't offer extreme agility without ongoing, committed, profitable work. If they are going to be your insurance policy, recognize the corresponding cost.



MERGE AHEAD

Mergers and acquisitions pose some unique challenges to technology management.

Vendor: If you are told one of your key vendors is merging or being acquired, probe the implications to your platform with the vendor, their partners and industry analysts, but accept that you (and they) may not know the fate of the particular products you have for months or even years. Mergers often result in a suite, but it may not be a consolidated suite any time soon. Keep an eye on the roadmap and its stability. You also want to focus on your support resources and their role and expertise in your specific technology, and the fate of those involved in the merger (e.g., implementation and support teams). Build your plan with a “best guess,” but prepare to update as the vendor plans evolve.

Company: If you find out your company is merging or being acquired, assess the implications for all the contact centers across both organizations ASAP. It’s rare that a merger or acquisition is based on contact center resources or even considers them. At the start of the combined companies’ existence, you have diverse organizations, channels, systems and processes, making it difficult to get much synergy. As soon as business goals become clear, define the vision and plan with two perspectives. The short-term view addresses the period when the business and centers are still separate but taking advantage of what you can for business benefit (e.g., limited backup). The longer-term view addresses center consolidation, virtualization, or centralization for greater value in economies of scale and extended hours. Those require you to tackle process and technology reconciliation first. If the two will remain separate long term, see if there are other best practices you can share to improve each, such as IVR capabilities, metrics and QM scorecards, and WFM. Regardless, you have the potential to create “centers of excellence” in how you use technology across the centers.

Technical agility and/or operational agility teamed with challenges getting adequate response from in-house IT have pointed centers at cloud and hosted solutions, and sometimes at managed services. These options shift the reliance to the vendor and their technology to respond to change. These alternative technology sourcing strategies appeal when IT is lean and/or has opted to move away from contact center technology and focus on core business applications. Many things can be done on the fly through the cloud, such as standing up additional groups, adding media, or adding capacity (something they are particularly well suited to). Changing or adding to IVR capabilities, integrating new systems, adding or altering network connectivity to sites, or other more significant actions require a SOW and a professional services project. Again, these take time, so plan accordingly.

A Change Is Gonna Come

Don’t let change overrun or overwhelm your center and its technology. Plan with an eye on agility and responsiveness. Put the right tools, processes and resources in place proactively—whether internal or external. You may not be able to anticipate every change that will come at you, but when they do, you’ll feel more confident that you will be ready to respond.

Lori Bocklund is Founder and President of Strategic Contact.

lori@strategiccontact.com
(503) 579-8560

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@SusanHash • @CCPipeline   youtube.com/ccPipeline   linkd.in/17M5rKM

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PIPELINE PUBLISHING GROUP, INC. | PO Box 3467, Annapolis, MD 21403 • (443) 909-6951 • info@contactcenterpipeline.com