# HOW TO GET A LOT (OF TECHNOLOGY) FOR A LITTLE (CENTER)

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Contact Center
Pipeline

# HOW TO GET A LOT (OF TECHNOLOGY) FOR A LITTLE (CENTER)

## Today's technology solutions offer capabilities and innovations for the small contact center.

BY Lori Bocklund, Strategic Contact

Every small center aspires to deliver good (or great!) service to customers and offer a good (or great!) place for employees to work. The realities of small centers and big technology can make these rather simple goals feel daunting. But excitement abounds with today's technology solutions, including cloud, suites, managed services and innovations that "trickle down" to the small center.

### Common Challenges

If your small center struggles with limited resources, you can find comfort in knowing that you are not alone. A variety of common challenges confront small centers.

Although sophisticated contact center technology has been available for a long time, robust solutions at an affordable price has not been the norm. Small centers often used limited functionality from the enterprise "phone system" or bought a basic solution to meet the center's specific needs.

Small centers may have different routing and reporting tools across media. We often see a separate (cloud-based) chat tool and Outlook for email, presenting challenges to manage performance and use resources across media effectively. Excel for workforce planning and basic call recording (with no functionality for quality scoring and calibration) compromise how well, and how often, these important support tasks are performed.

Manual interaction handling processes cover for little automation or workflow and a lack of tools like Knowledge Management. But these manual processes contribute to long training and handle times, and potentially low First-Contact Resolution (FCR). A cluster of desktop systems cobbled together have a similar effect.

A serious situation can occur when technology approaches end-of-life, risking instability before the company gets around to replacing it. Limited IT (and/or vendor) support is often a contributor to this situation, with no expertise, interest or time to focus on contact center technology. A shortage of support resources leaves managers and supervisors wearing many hats and, almost inevitably, neglecting some important tasks. *They can't do it all!*

### Things Are Looking Up

Vendors now offer much greater capabilities to small centers in both breadth and depth. The enterprise market has matured, and technology innovations, such as software-only solutions running on virtual machines, have reduced costs. Major vendors know the small center market is BIG. Cloud vendors make it "easy and quick" with little reliance on IT.

As you explore the contact center technology opportunities, consider both the vendor products and their partner offerings. You might find combinations of products, add-on applications and professional services that help you achieve your goals. You'll see the important role that Value-Added Resellers (VARs) can play for small centers.
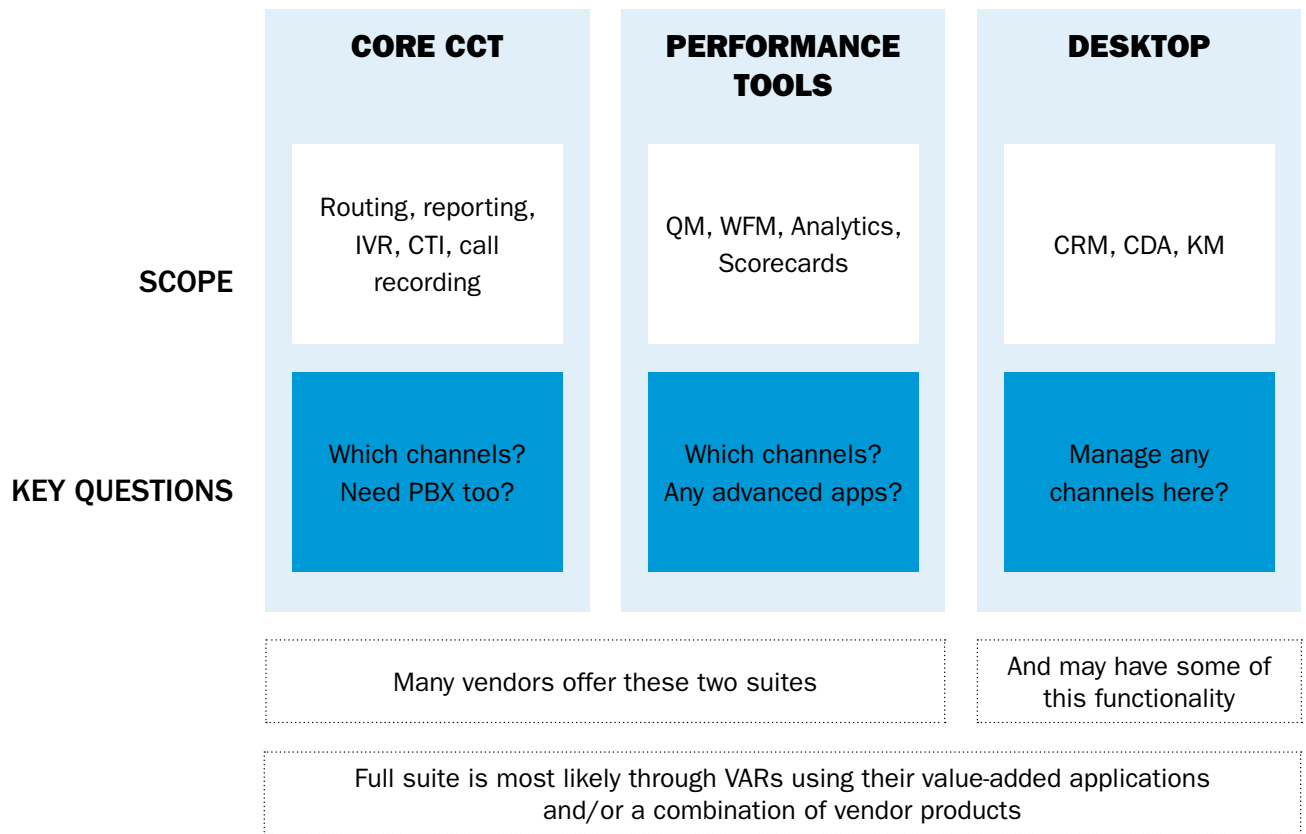
### The Cloud for Small CCs

The cloud is a good fit for small centers for many reasons. Chances are you want—or need—to move fast, and many vendors are willing to oblige, especially if you aren't doing anything complex or unique in your routing, functionality or integration. It's likely they will charge low or no upfront costs, as well. While "simplicity" goes hand-in-hand with low IT demands, don't let IT totally off the hook. They may need to be involved for network connectivity, integration, testing and troubleshooting.

Cloud solutions offer robust functionality with agility and flexibility for growth in capacity or maturity. Maybe seasonally you're not as small (e.g., during enrollment or the holidays) and don't want to pay for peak licenses year-round. If you want to add functionality as you grow and mature (*or as your budget allows*), that simplicity kicks in again. With the right vendor and pricing approach, you can pay as you go. The vendor

**FIGURE 1:** You Want a Suite? Sweet!

| | CORE CCT | PERFORMANCE TOOLS | DESKTOP |
|---|---|---|---|
| **SCOPE** | Routing, reporting, IVR, CTI, call recording | QM, WFM, Analytics, Scorecards | CRM, CDA, KM |
| **KEY QUESTIONS** | Which channels? Need PBX too? | Which channels? Any advanced apps? | Manage any channels here? |

Many vendors offer these two suites

And may have some of this functionality

Full suite is most likely through VARs using their value-added applications and/or a combination of vendor products

will keep making new things available and you will be able to take advantage of it if/when needed.

MANY choices await the interested buyer from cloud-only vendors and premise vendors who now offer cloud solutions. Many offerings target small centers—even if these options are really about packaging, marketing and pricing. Vendors also offer out-of-the-box integration with popular CRM solutions like Salesforce, Microsoft Dynamics and Sugar.

Cloud options are pretty exciting, but they don't excuse you from doing your due diligence. You'll need to consider the right types of vendors as not all cloud solutions are created equal. Most small centers will consider shared tenant solutions (sometimes referred to as "true cloud") as they fit the lower cost, easier, faster model we're talking about. Make sure that your requirements address functionality, architecture (including BC/DR), and vendor roles and responsibilities in implementation and support. Get clarity on the pricing, covering network, licenses, per minute, etc.—no surprises! Ensure that

there is a good Statement of Work (SOW) for implementation, with a project plan and timeline that includes testing and onsite time, if appropriate. A good contract and Service Level Agreements (SLAs) (with remediation) give you the protection you need in production. (See Tech Line columns: "Know Before You Go: The Path to the Cloud," March 2015; "Technology Selection at Today's Speed," November 2015; "Technology Implementation Challenges and Best Practices," August 2014.)

## You Want a Suite? Sweet!

Most vendors targeting SMB centers start with a suite of core technology such as ACD (routing and reporting), IVR, CTI and call recording. Most of these will offer a wide range of channels. Some suites offer performance tools like WFM, QM, VoC, analytics, scorecards, etc., many of which weren't typically the realm of small center solutions or came from third parties. The suite offering doesn't mean you have to turn it all on at once. So, for example, a small center may start with the QM functionality to go with the recording capability, then

add more functionality later. You may even find desktop elements such as CRM and KM as options from a VAR. (SEE FIGURE 1.)

Again, requirements clarity gets the right solution elements from the right vendors or VARs. A first question is whether a PBX is needed or if you will leverage an existing enterprise solution (and therefore need to integrate). Consider channels and performance applications (the bigger you are or will become, the more that list grows). Even if you don't implement all the functionality day one, consider the potential needs and growth three to five years (or more) out to find the right fit. Easy and fast messages from vendors are good, but don't interpret that to mean it's easy to change platforms—it's not!

## When Do Managed Services Fit?

If you can't get *any* IT help or hire support staff in your center, you can buy additional expertise and support to go with your technology. With Managed Services, the vendor takes on more of the traditional IT role, with a spectrum

## These Are a Few of My Favorite Things for Small Centers

We see lots of innovation from our clients with small centers.

**HERE ARE A FEW OF MY FAVORITES:**

▸ SharePoint for KM, but structured well, managed and updated, including workflows (thus it needs someone assigned to manage, update and maintain!)

▸ Cloud-based CRM makes its way to the center, not just for other parts of the organization; many centers really want (or need!) to be a part of this effort

▸ Low-cost WFM solutions if you get big enough—typically cloud-based, with good interfaces, and the ability to secure data from many systems that small centers typically use (cloud or premise)

▸ Investment in self-service of all sorts—IVR, web, mobile—because it can have a HUGE impact in reducing the contact center burden; this area may not be CC responsibility but CC leaders work with their counterparts to prioritize

▸ Multimedia routing and reporting tool—No silos, no ignoring or making non-voice channels second class

▸ Survey Monkey or Survey Gizmo for CC-specific Voice of the Customer (VoC)

of possibilities for implementation and ongoing management, and proactive and reactive tasks (see "Managed Services: Easy to Want, Hard to Buy," Tech Line, February 2016).

Managed Services is not a low-cost solution, but it's a good option when you need the vendor to be responsible for more fundamentals. Carefully define scope and how you will be paying for it. For example, will you have a monthly allocation or pay per action? Does the service include proactive optimization or just reactive tasks? Is it more about monitoring, supporting and managing the system, or user administration and adding business value? Find a provider that has the right services to go with that exciting solution.

> ## When competition cranks up, everybody has to offer more to stay in the game.

### Innovation Trickles Down

The innovation from vendors for big center solutions, niche applications and new platform architectures all lead to benefits for small centers. Vendors extend what is done for big solutions to small solutions. When competition cranks up, everybody has to offer more to stay in the game. Big vendors buy up little niche applications (or integrate with them) to create valuable functionality for small centers. For example, some of the "big" contact center technology vendors (e.g., Avaya, inContact) have bought performance tool vendors to expand their portfolio with a particular fit for smaller centers.

Here are a few examples of the trickle-down we've seen. Most solutions are fairly comprehensive in their channel offerings, including not just voice and email, but chat, text/SMS and social media. They may even offer co-browse and video. Some vendors have analytics not just to create reports, but to use the data to drive insights and action, and agent scorecards and dashboards have become ever more prevalent. Those offerings go hand-in-hand with easy interfaces for agents, supervisors and administrators, contributing to the message of "fast and easy."

With a "Do-it-Yourself" mindset in leverag-

ing these interfaces, the center can do more without IT or the vendor. Want to change routing or a menu, redesign a desktop or create a new report? You can do it; it's just configuration with an easy-to-learn tool (although you can't skip training!). Good options for third-party development are also available if you want to take advantage of that, enhancing what you can do on the platform you buy. The outcome is personalization and customization to better serve customers and more data and insights to manage and develop staff.

### Small Center Technology Succeeds with People and Process Partnership

While many of the small center challenges point to technology needs, success requires more than affordable technology. Our projects and surveys tell us the biggest issues small centers face are about people and processes (see "Contact Center Challenges and Priorities," Tech Line, January 2016).

People must USE technology effectively, whether in the contact center or IT (or vendor/VAR through services). If your focus is to do more within the bounds of your center, try to secure an analyst with the technology responsibility. Otherwise, the responsibilities typically fall to managers or supervisors (or a team lead or top-performing CSR). This approach can work—and provide a great career growth opportunity—if it's the right individual with properly allocated responsibilities and the time and focus to go with it.

Process needs for frontline contact handling, from identify to transact to follow-up, demand that centers of any size be smart about how technology is applied. Processes for support functions such as QM, WFM, analytics and ongoing process optimization also ensure good use of that robust technology. Place this process focus in the hands of the assigned people and make sure you clearly define who is wearing what hats. With the right people and processes in place to leverage the exciting technology available, small centers can do big things! ⦿

*Lori Bocklund is Founder and President of Strategic Contact. (lori@strategiccontact.com)*

## About Contact Center Pipeline

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