

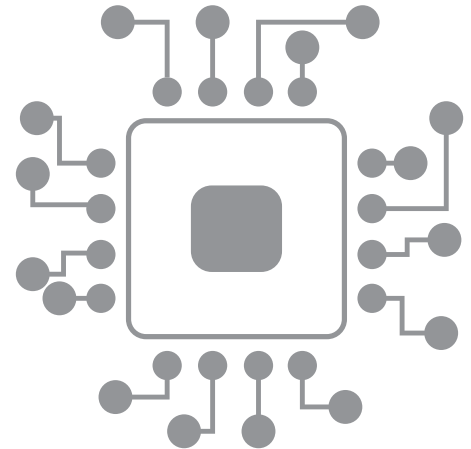
# STRATEGY FIRST IN TECHNOLOGY SELECTION

*“Take a top-down strategic approach that keeps you in charge and focuses on what really matters to your center.”*

# STRATEGY FIRST IN TECHNOLOGY SELECTION

**Anchor your decision-making process in defined strategy, requirements and selection criteria.**

BY Brian Hinton, Strategic Contact



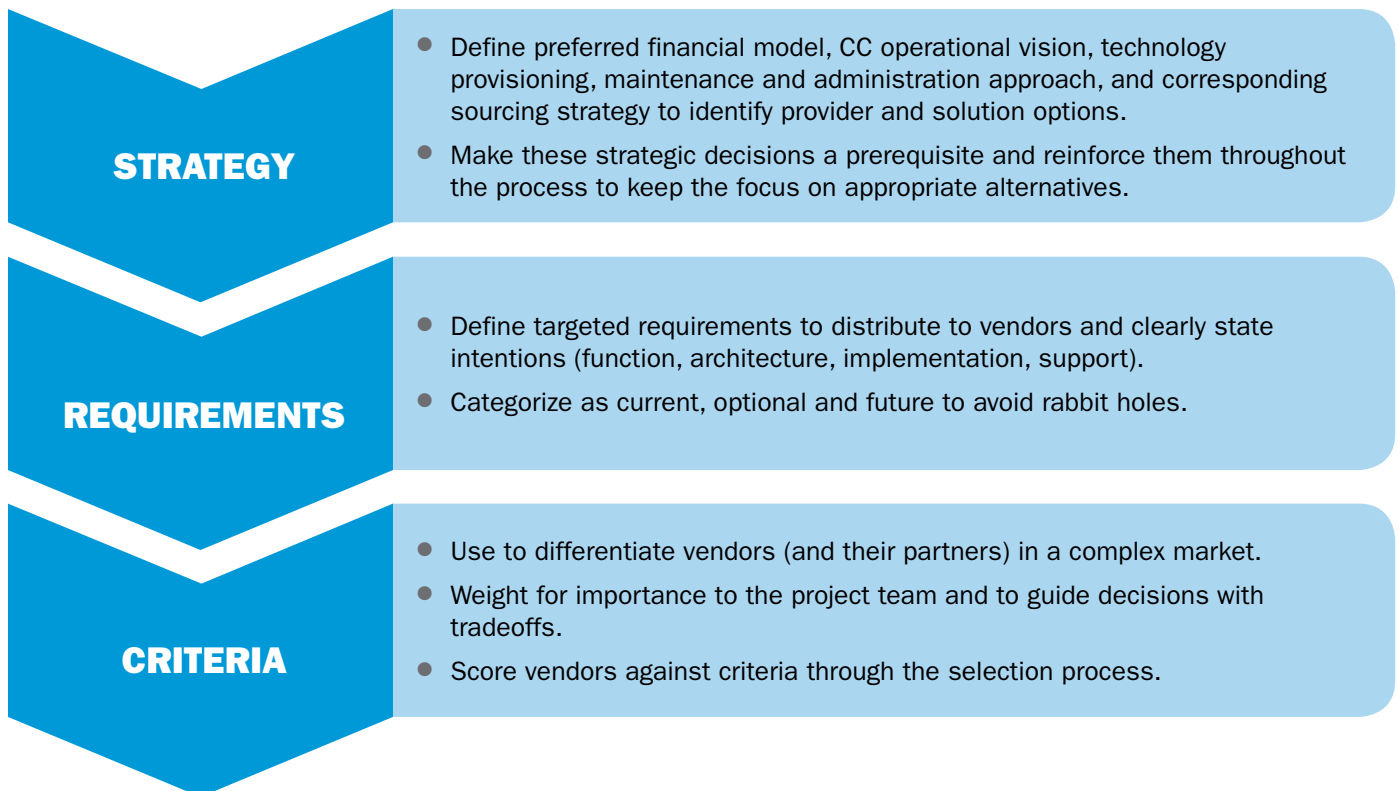
Contact center technology selection is more complex than ever. The vendors all lay claim to a mind-boggling array of capabilities. Buyers must define the scope amid the tension between their enthusiasm for the technology and the reality of budget and resource constraints. In the wake of agonizing scope decisions, they face myriad sourcing

options that are tricky to sort through. This complexity makes it difficult to narrow options and focus on a few targeted vendors (and their partners!). As such, it is more important than ever to define your technology strategy, requirements and evaluation criteria to guide the process, narrow options, maintain control and select the right solution for your center.

## Don't Run Adrift

Technology selection without strategy, requirements and criteria (FIGURE 1) is like a rudderless ship—continuously roaming the sea of options without docking at the right port. Some fall prey to “dog and pony” shows that focus on exciting demonstrations of what “could be,” whether the “could be” is a

FIGURE 1: Strategy, Requirements and Criteria Add Direction to a Complex Process



requirement or not. All the attention goes to the “shiny object” and the exciting possibilities. Others are paralyzed by a Fear Of Missing Out (FOMO) or Fear Of Better Options (FOBO). They keep collecting information and struggle to move forward. They may stay stuck in perpetual information-gathering mode without a specific project or timeline. Or, when they do have a specific project and timeline, they use speed to drive the project, thereby short-circuiting a carefully considered process.

It is very tempting just to request proposals/bids for several solution combinations—e.g., cloud and premise; multi- and single tenant cloud; enterprise telephony and/or contact center solutions (or even a separate PBX for just the contact center); workforce optimization components included or not; partner or vendor direct. The goals seem straightforward: compare costs, functionality, etc. (and avoid FOMO/FOBO!). But it can be overly burdensome for you and the vendors, and you risk not being at the helm of this ship, or able to steer it if you are.

Some vendors don't bid since they see the process as not serious or worth their time. Others choose what option to bid (avoiding multiple proposals/bids) and may not pick the best solution *for you*. Worse yet, you can work through the entire evaluation process and not be able to make a clear choice. You are still left with too many options, and it's hard to compare apples to apples, especially when responses are inconsistent (e.g., premise cheaper with this vendor, cloud looks better here, this one has more functions on the premise solution but I like the cloud solution better, etc.).

### Directed Decision Making

Instead, take a top-down strategic approach that keeps you in charge and focuses on what *really* matters to your center. Define manageable timeframes that keep vendors (and the project team) engaged with clear purpose and goals. Market spin can make you think today's contact center technology is all fast

and easy—but it's not! The project team and your executives need to understand what it takes to succeed (not necessarily fast or easy, but good). Build in milestones that keep the process moving forward while ensuring that each step means definable progress toward selection.

When dealing with vendors, describe your requirements and preferred sourcing strategy clearly to ensure they present the right types of solutions (sourcing, price point, functionality, etc.). Stay focused on current feature/

function requirements and eliminate vendors accordingly while still taking the opportunity to learn about other capabilities. Get them to provide hard data about reliability—it's a valid concern. The market has seen some turmoil with outages and realistic reliability goals can be a bit of a

moving target. Beware: Understand Service Level Agreements (SLAs) and the response and remediation that goes with them.

Feel free to talk about future “dreamland,” but don't let those discussions drive the decision. Minimize the “what if” discussions (e.g., “What if... we do CRM,” “What if... we add text or chat”) and put them in the right context and timeframe. The result will be a decision you can stand behind. Trust in the criteria you define, and let that drive the process. Preempt an executive's (unfounded) overrule by pointing at process, reasons and results.

### Establish the Foundation

If you want a positive outcome, anchor the decision-making process in defined strategy, requirements and selection criteria. Set a context with the corporate financial drivers. Identify how the company likes to purchase technology (CAPEX or OPEX) and the overall budget or expected total cost of ownership (TCO) (e.g., across five years).

Your IT department should contribute their technology strategy to guide sourcing preferences driven by issues such as IT's resource constraints, hot buttons (often earned), and internal expertise. Examples include: “We don't want to be in the data center busi-

ness...” or “We don't want to risk anyone else's activity impacting us...” or “We want control of our own systems and have high security requirements...”

The contact center operational strategy helps set context, too, including desire for control in the administration of the solution, expectations on user needs such as mobility, ability to handle seasonal peaks, and business continuity plans. Don't forget contact center leadership hot buttons (also earned!) around functional gaps, agility, scalability or other factors.

Define the scope for replacement based on the age of, support for and satisfaction with all enterprise and contact center technology components. Define what's in for this round of consideration, and what may be postponed to a later date. Make sure that any decision reached today works compatibly with technology that may be integrated downstream.

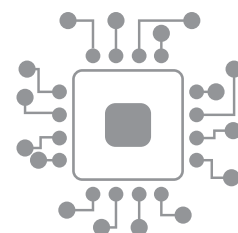
Focus on detailed requirements covering contact center operational features, technology requirements and requirements for the vendor role in implementation and support. Include integration requirements for screen pop, data-directed routing, IVR self-service and CRM.

Evaluation criteria will guide you each step of the way, providing direction for the scope and content of vendor proposals and a focal point for subsequent discussions. Define what is most important to you and what will differentiate one vendor from another. Avoid commodity type functionality that doesn't vary much from one vendor to another. Weight the criteria on importance and use them to score vendors throughout the process and work through the inevitable tradeoffs you will face.

### NAVIGATION TIPS TO HELP FIND YOUR WAY

Building on that foundation for your process, here are some specific tips that will help you navigate today's technology selection realities.

**TAKE TIME TO LEARN:** Before requirements development and distribution, there should be an education



Market spin can make you think today's contact center technology is all fast and easy—but it's not!



## The “Roadmap Game” in the Wild, Wild West

We call it the “Wild, Wild West” because so much is new, still being defined and changing in the world of contact center technology. While it’s easy to get enamored over a demo or think the low-cost solution you just heard about is the one for you, beware of the “roadmap game.” Explore what is really available today from the vendor (or their partners). Get the straight scoop on how solid their product roadmap is because dates do slip. (Oh, how they slip!) Assess what it means for your center if you live without those future functions for a while.

Functionality is not the only thing evolving. Some SLAs are not well defined or competitive. Look at target uptime. Can you live with minutes or hours of downtime per month? Can you live with minutes or hours for response time? What form of remediation is acceptable? Is a 10% incentive enough to hold the vendor accountable?

Architectures and their subsequent resiliency may rely on third parties such as AWS, Twilio and data center providers. We know those vendors are still learning how to fend off attacks and detect and recover quickly if issues arise. And value-added resellers and vendors continue to change and add dance partners. Know who you’re dealing with (or should deal with) and assess their fit for the services you need for implementation and support.

process that fends off the FOMO/FOBO/what-ifs before they become a distraction. Read about vendors and solutions through industry periodicals and attend industry conferences. Hold vendor discussions and demos but limit the time allowed and provide an agenda targeted toward resolving open option discussions. The goal at this stage is ensuring that contact center and IT leaders don’t feel they are missing out on something. They’ll rest assured knowing they’ve done the research and have gotten a taste for what’s possible.

**REMIND AND REINFORCE:** Reiterate decisions and selection criteria to keep people focused and on track. It’s more fun (and easier) to talk about the latest/greatest. No one wants to be the team member who focuses discussion back to the team’s prior decisions, but it is necessary to keep moving forward. Part of the project manager’s or executive sponsor’s role is to not let anyone throw a monkey wrench into the plans. The speed at which decisions are revisited these days can be astounding—even in the same meeting! Documented decisions and criteria and someone willing to “beat the drum” are crucial to forward momentum.

**FOCUS ON TODAY WHILE CONSIDERING THE FUTURE:** Divide discussion topics into three categories of requirements:

- ▶ Current—include in requirements and vendor will include in current proposal.
- ▶ Optional—include in requirements and instruct vendor to price separately as an optional item.
- ▶ Future—include in requirements with clear “future” designation and instruct vendor to briefly discuss their ability but not to include in pricing.

Once topics are categorized, ensure that discussions deal with each topic at the appropriate level.

**WEIGHT AND IMPORTANCE:** Focus on overriding decision factors—the deal breakers. If how you pay is an absolute, then OPEX usually means cloud and CAPEX means premise. Since speed is often a primary driver, assess your need for speed and target appropriate options considering speed (cloud is typically a faster implementation) (see “Technology Selection at Today’s Speed,” *Pipeline*, November 2015). General features are not typically overriding decision factors as many

have become common across all platforms. There may be some differentiators based on the use of your current technology or knowledge that you have gained in your industry research. “Ease of use”—one interface for the entire solution with easy administration—is an example of something that can be differentiating. Leading-edge solutions (e.g., some true cloud options) may be more likely to have functional gaps (**SEE THE SIDEBAR ON THE “ROADMAP GAME”**).

Ease of integration can also carry some weight based on the role data plays in your processes and other applications used on the agent desktop. And consider support options offered—for instance, organizations with limited IT will require the vendor’s support organization to do most of the work, even up to managed services where the vendor performs moves/add/changes. Not all vendors offer all levels of support and many rely on their partners.

Finally, remember you can have some real heavy hitters that override other factors. The overall IT strategy (around security, control, network ownership) can be one of the primary ways to narrow sourcing options. Not all vendors offer enterprise telephony, WFO, CRM, etc., so scope can also quickly focus the team on the right choices to consider.

### Not Just Any Port in a Storm

It’s an exciting, though tumultuous time for both buyers and sellers of contact center technology. The best way to live in this market (aka Wild West) and survive the internal business pressures (Fast! Low cost! With few resources!) is to define, execute and trust your process. Accept reality and know there probably isn’t a perfect answer, but there are some perfectly good options. It’s likely you can’t have it all. But if you have strategy and plans, you can limit how far you go off your ideal course. Find something that is going to work well and get the job done. Acknowledge the risks and mitigate them through thoughtful, defensible decision-making. ☉



Brian Hinton is the Principal Consultant at contact center consulting firm Strategic Contact. (brian@strategiccontact.com)

---

## CONNECT WITH PIPELINE



@SusanHash • @CCPipeline



[youtube.com/ccPipeline](https://youtube.com/ccPipeline)



[linkd.in/17M5rKM](https://linkd.in/17M5rKM)

---

### About Contact Center Pipeline

Contact Center Pipeline is a monthly instructional journal focused on driving business success through effective contact center direction and decisions. Each issue contains informative articles, case studies, best practices, research and coverage of trends that impact the customer experience. Our writers and contributors are well-known industry experts with a unique understanding of how to optimize resources and maximize the value the organization provides to its customers.

To learn more, visit: [www.contactcenterpipeline.com](http://www.contactcenterpipeline.com)

---



Download complete issues, articles, white papers, and more at <http://bit.ly/14bq01k>

**PIPELINE PUBLISHING GROUP, INC.** PO Box 3467, Annapolis, MD 21403 • (443) 909-6951 • [info@contactcenterpipeline.com](mailto:info@contactcenterpipeline.com)  
Copyright ©2017, Pipeline Publishing Group, Inc. All rights reserved.

**Reproduction of Contact Center Pipeline in whole or in part is expressly prohibited without prior written permission from the publisher.**