

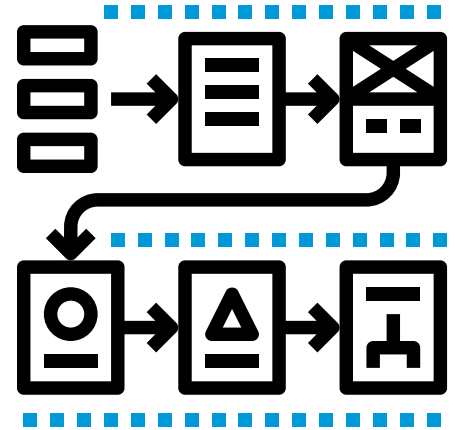
HASTE BUT NOT WASTE: FAST IMPLEMENTATION WITH SUCCESS

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avoiding problems that could
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HASTE BUT NOT WASTE: FAST IMPLEMENTATION WITH SUCCESS

Good planning can help you to move at a quick pace while still delivering business value.

BY Lori Bocklund, Strategic Contact



Look up “hasty” and you will find synonyms that convey speed and quickness next to others with less flattering connotations: injudicious, thoughtless, impulsive and rash. The latter will not earn you kudos from corporate leadership.

In this fast-paced era, doing things *right* doesn’t have to mean *slow*. In fact, a little planning can help you move at a good pace

while still delivering business value. After all, that’s why you are investing in something new, right?! Whether it’s a technology upgrade, rip and replace, or specific new capabilities, we’ve got some tips to help you succeed.



Start with a Little Planning

A typical project charter will identify the stakeholders and project team, the roles and

responsibilities of each, and the scope and objectives. As you target the “big three” goals of service improvements, cost reductions (or containment) and sales/revenue increases, use outcomes such as improved self-service, reduced volume, faster handle time, cSat gains and higher close rate to make those platitudes tangible.

It’s easy to get bogged down in the details

TABLE 1: Typical Approach (Don’t!) and What to “Do” for Positive Business Impact—**Project Execution**

|  DON'T: |  DO: | BUSINESS IMPACT |
|---|--|--|
| <ul style="list-style-type: none"> Launch during peak season | <ul style="list-style-type: none"> Launch outside of peak to allow issues to be resolved prior to peak; if implementation milestones are missed, alter plans (e.g., change phasing, delay implementation) | <ul style="list-style-type: none"> Better project outcome overall Employee engagement and retention (and health, and sanity, and...!) |
| <ul style="list-style-type: none"> Require center leadership and support to implement while doing their “day jobs” | <ul style="list-style-type: none"> Dedicate project resources, with specific involvement and checkpoints with center staff | <ul style="list-style-type: none"> Project success along with ongoing operations success Employee engagement and retention (and health, and sanity, and...!) |
| <ul style="list-style-type: none"> Assume success | <ul style="list-style-type: none"> Pilot (if appropriate) and test Define phasing Adjust based on outcomes Consider a back-out plan | <ul style="list-style-type: none"> Minimum interruption and impact if something fails |
| <ul style="list-style-type: none"> Assume vendor’s testing is adequate | <ul style="list-style-type: none"> Conduct thorough testing (e.g., call flows, dial plans, network, integration) | <ul style="list-style-type: none"> Better project outcome Minimum corrective action required after go-live |
| <ul style="list-style-type: none"> Assume the vendor/partner “owns” all services | <ul style="list-style-type: none"> Understand any third-party roles, integration between the parties, and who is responsible for what | <ul style="list-style-type: none"> Clear delineation of responsibility with SLAs and enforcement Avoid finger-pointing during trouble resolution |

of a project plan. Yet it's important to consider not just how you're going to implement this new thing, but what you are going to do *differently* this time, and what you will *achieve* (and/or what business problem(s) you are solving). It is very tempting to take the "replicate for now... pursue changes later" approach because it is often what the team, as well as vendors and their partners, prefer. (It's fast and easy, leading to cutover and billing sooner!) But, it inevitably leads to your center being stuck in the old ways as it is hard to get around to making changes later. "As-is" is a dangerous path that can turn technology excitement and promise into disappointment and cynicism. It's no wonder many leaders

distrust technology investment!

So what do you do instead? Define changes to processes, new workflows and call flows, new/improved user interfaces, etc. Establish success metrics that enable you to monitor progress toward goals after implementation. Then you can report to executives that there was value in the implementation, increasing your credibility and potentially simplifying approvals in the future.



Part of achieving success is avoiding problems that could compromise it. So, the initial planning should also proactively address some of the "typical" problems implementations face, including use of internal resources, vendor roles, project timing, and functional

plans. The two tables give you common approaches to avoid in project execution (TABLE 1) and functionality (TABLE 2), and some "must-do" alternatives to deliver positive results.

Define Phases

With speed as a driver, phasing can help you get something done sooner, while not losing sight of the overall goals. A manageable first phase lets you get an early win, ideally having a noticeable impact. You may slice phasing by groups, customer subsets, application areas, channels, phone numbers, etc. Look at what you can readily carve out without overcomplicating the rest of the implementation. Keep in

TABLE 2: Typical Approach (Don't!) and What to "Do" for Positive Business Impact—Functionality

|  DON'T: |  DO: | BUSINESS IMPACT |
|---|---|--|
| <ul style="list-style-type: none"> Replicate old menus, skills and routing | <ul style="list-style-type: none"> Redesign all menus, including scripting and structure/flow Redesign (and often, simplify) skills and routing | <ul style="list-style-type: none"> Better customer experience Shorter handle times Less misrouting and transfers |
| <ul style="list-style-type: none"> Ask vendor if they support a channel (e.g., chat, text) but never turn it on! | <ul style="list-style-type: none"> Incorporate new channels into project planning, with a pilot where appropriate Define processes, knowledge content, standard responses, etc. Define where, when and how the channel is offered to customers | <ul style="list-style-type: none"> Enhanced customer experience through channel choice Employee engagement and retention |
| <ul style="list-style-type: none"> Recreate all old reports in new system | <ul style="list-style-type: none"> Take a fresh look and define a new metrics and reporting strategy to focus on the right goals | <ul style="list-style-type: none"> Improved customer service Better performance on targeted KPIs Better decisions based on accurate, trusted data |
| <ul style="list-style-type: none"> Recreate old QM form in Excel | <ul style="list-style-type: none"> Revisit QM process and forms, taking a "fresh" look at all elements | <ul style="list-style-type: none"> Better quality Employee engagement and retention |
| <ul style="list-style-type: none"> Continue to forecast through tool/process only one person understands | <ul style="list-style-type: none"> Assess if WFM can meet forecast needs and use it if possible (and if not, formalize the process and document) Crosstrain on tools | <ul style="list-style-type: none"> Greater accuracy and/or trust of results Reduced risk |
| <ul style="list-style-type: none"> Buy analytics tool(s) and assign to someone to use "in their spare time" | <ul style="list-style-type: none"> Assess roles and individual skills in support functions and assign specific analyst duties or create new role | <ul style="list-style-type: none"> All the outcomes expected of such a tool—e.g., improved performance, cost savings, product/marketing insights, etc. |
| <ul style="list-style-type: none"> Pop screens but keep same old processes for greeting, ID&V | <ul style="list-style-type: none"> Modify greetings and Identification and Verification processes based on matched data and security needs | <ul style="list-style-type: none"> Better customer experience Shorter handle times Reduced fraud risk Employee engagement |

WHEN DO PILOTS MAKE SENSE?



Phasing is more likely than a pilot, although pilots still have their place. For example, they are a great fit when you are doing something you are not sure you will roll out, or that has high risk. They also help with “nichey” applications or ones that are relatively new, such as those that target security and fraud prevention. We like to differentiate a pilot as a “try it out” situation (when you are not committed to rollout of pilot solution or approach), rather than implementing a first phase and then optimizing as you roll out (when you are committed to going forward). You may even pilot a cloud solution, as some vendors offer “free trials” or easy contract cancellation terms.

mind that the lack of a “big bang” cutover of everyone and everything at once can have ripple effects into routing segmentation, network requirements, integration, functionality offered to customers, etc. Decide what level of design and integration you will tackle early. See if you can make an impact on the customer experience as well as the agent experience, building goodwill for the additional changes to come, and gaining important insights to tuning as you roll out.

Subsequent phases should then follow quickly so you can maintain momentum and keep resources assigned and focused—both internally and with your vendor/VAR. The whole implementation is one plan defined by milestones which are accomplished before moving on to the next step, not many projects strung out over years. And keep in mind that phased implementation can affect licensing, so you should understand how your vendor structures licensing by function, channel, users, etc., and plan accordingly.

Test—Yes, Test!

Testing is a dreaded step for implementation teams. It's tedious work, and many wonder if all that effort will result in an earth-shattering discovery. With cloud solutions, it seems even

less important as the system is in, up and running already. But a little testing can go a long way to ensuring a successful cutover—whether premise or cloud. And while it may be more important for premise, it is still important for cloud solutions to address the things unique to your environment and configuration.

Define a targeted set of test cases that address the main changes and ensure the users (internal and external) will have a good experience day one. Testing is particularly important for things like menus and call routing, but its importance extends to anything that is important to your operation (e.g., reports and recordings).

Depending on the source of your network and how much is changing, verifying connectivity and performance can be critical as well. Examples of where it may be important include multisite, new connectivity to a cloud solution or big changes to load burden, and therefore, capacity demands on your existing LAN and/or WAN (e.g., first migration to VoIP, changing overall architecture). SIP is another example of an impactful network change that warrants testing. If you are pursuing that migration, testing (and/or pilots) are important. (For more on SIP, see our January 2018 Tech Line column, “SIP in the Contact Center,” where we highlight configuration as perhaps the most vulnerable element—and a great argument for testing!)

Recognize that the majority of the burden for testing, and for User Acceptance Testing (UAT), in particular, is on the buyer, not the vendor. UAT is extremely important as it shows whether or not the solution as implemented and configured is meeting the defined requirements. Vendors/VARs often do little in the way of UAT, although partners are more likely to help through (fee-based) professional services. They may also offer guidance to you on user acceptance testing you perform. Tap their expertise, if possible, but don't assume they will be involved. Unless it is specifically outlined in an SOW, assume the testing the vendors/VARs do is just to confirm the system is “working.”

Define appropriate test types: UAT and System Integration Testing (SIT) at a minimum, with the possibilities of load and/or failure/recovery testing (depending on your situation/application/industry), and usability if you are doing something dramatically new

for your customer interface (such as speech recognition or bots).

One of the dread-inducing tasks is developing test plans. That means crafting appropriate test cases, with associated inputs, expected outputs, tester instructions, and the tools and database to capture outcomes. These plans should equip the team to conduct the tests, capture results in a formal manner, validate issues, troubleshoot and resolve (hopefully!). Then, retesting must ensure all issues are resolved and that no new issues have surfaced as a function of changes made.

What About “Modern” Approaches?

Some IT departments pursue “agile,” “scrum” or “waterfall” approaches to technology projects or application development, taking a different view of how to use a team. The underlying goals generally include moving faster, in increments. Others talk about “fail fast” with a willingness to try things and, if they don't work, yank them out. This mindset might migrate into contact center technology projects.

While these modern approaches have their place, approach with caution for the contact center. Not to say that the center is more complex than any other business operation, but it is still risky because of the impacts on people—customers and agents—and processes. Assessing an implementation as a failure too quickly can lead to a dangerously dynamic environment. You don't want to create an erratic customer experience, or a bad one! You also don't want to subject agents to relentless technology change as it always has process implications (and ripple effects to training, at least).

With good planning, you can try things. You need a well-defined scope and a good back-out plan (with criteria for determining success or failure), along with good measures of success. If it isn't working based on established criteria, assess why. Then decide if you fix it, providing a chance to succeed and avoiding too much change and back and forth for your employees and customers. If you decide to undo it, it's time to redo or try something else.

Speedy Success

In today's world, we recognize centers need to be agile and move fast. Cloud technology

reinforces—and enables—this message. People want to implement contact center technology relatively quickly, but they also want positive outcomes with tangible benefits for customers, the center and/or the com-

pany. You can find rapid success, but don't ignore the goals and metrics, the realities of technology complexity, and the critical role people and process changes play in making that new technology shine. ●



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