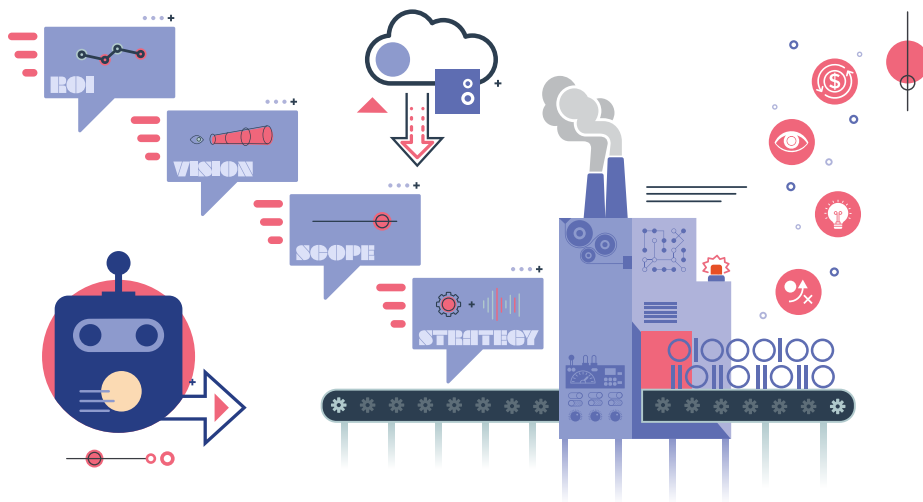# MAKE TECHNOLOGY A *STRATEGIC* TOOL

"Getting technology right is about not letting the day-to-day fire drills stop the ongoing activities to plan for, implement and optimize changes."

Contact Center
pipeline

MAKE TECHNOLOGY A *STRATEGIC* TOOL

Get the fundamentals right to deliver value that matches the promise.

BY LORI BOCKLUND, STRATEGIC CONTACT

Despite all the excitement around contact center technology capabilities and innovation, many centers continue to fall short when it comes to getting value from their investments. Our recent "Future of the Contact Center Survey" showed that skepticism continues to lurk out there for new technology, such as bots and artificial intelligence. I'm not surprised. When technology is pursued in a vacuum or amid the glow of "shiny object syndrome," it's not on the path to success. But it doesn't have to be that way.

Technology can be absolutely transformative. This Tech Corner will provide "top tips" for getting it right—because it's more important than ever! It all boils down to the fundamentals of defining, planning, selecting, implementing and supporting technology (<u>SEE FIGURE 1</u>).

Strategy and Planning

Strategy is the starting point, defining the "what, why, when and how." Whether you have a steering committee or just need to submit your budget priorities to management, your technology plans need to provide a compelling value statement, an attractive return on investment, and minimal exposure to risk. It also must demonstrate a clear expectation of resources needed and the people and process changes that accompany the technology. If you haven't thought things through, you shouldn't put yourself through the approval process!

CHECKLIST

Top 10: Get on the Right Page and the Same Page!

We emphasize how collaboration and relationships are key—between the CC, IT and vendors. As you do the *hard work* to get value from contact center technology, here is the "Top 10" list of things to define so everyone is on the right page, and on the same page:

1. Sourcing strategy—premise or cloud (and what type of cloud)
2. Architecture—things like redundancy, network connectivity, desktops
3. Administration/Management—who can do what types of changes, and how they are made
4. Support—roles and responsibilities, and who can contact whom
5. Monitoring—roles and responsibilities, and what happens if…
6. Root Cause Analysis—a process that ensures issues lead to learning and changes
7. Business Continuity/Disaster Recovery—documented plans that are tested and updated!
8. Testing—what type of testing is needed and when, and who will perform it
9. Security/compliance/fraud prevention—the hot buttons and how they are addressed
10. Service Level Agreements—commitments for performance, responsiveness, resolution

Collaboration and Relationships

Strategy requires a cross-functional team of business and IT leaders, working together to identify priorities and develop plans and requests for budgets. While the CC often has the lead role in defining the "wish list," that list has a better chance of success when

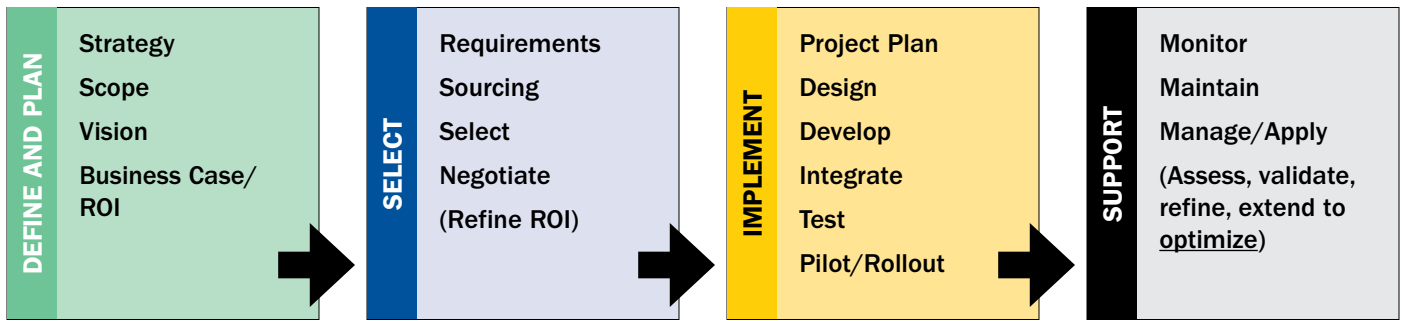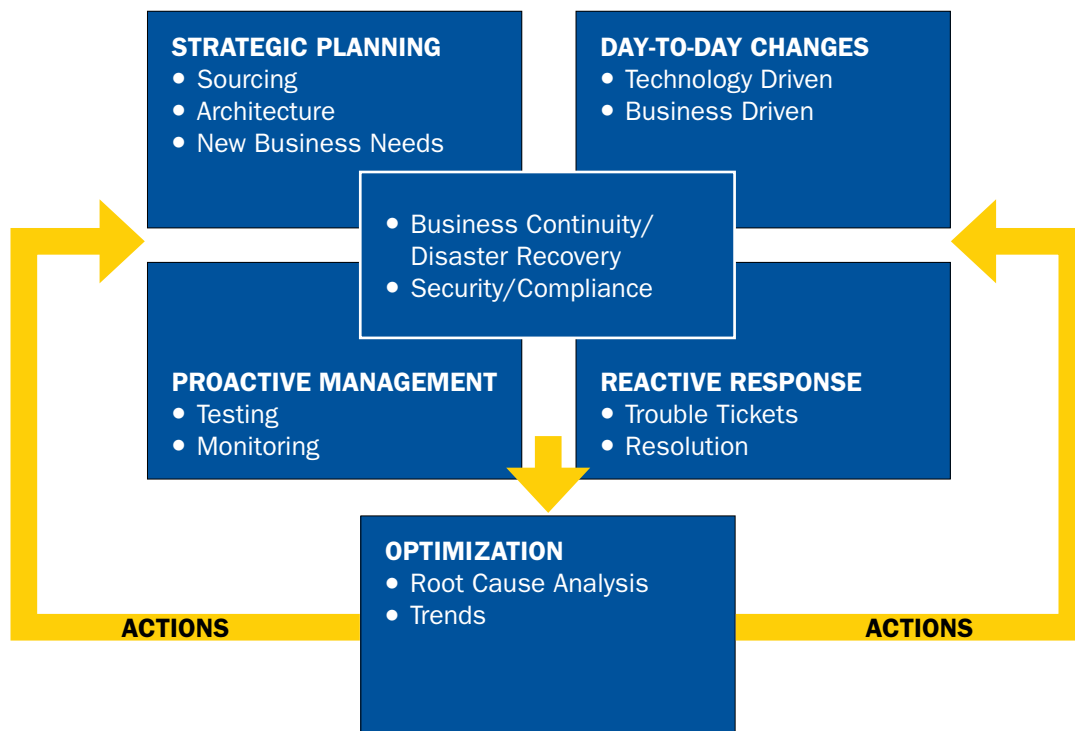**FIGURE 1:** Contact Center Technology Project Life Cycle

DEFINE AND PLAN	SELECT	IMPLEMENT	SUPPORT
Strategy Scope Vision Business Case/ROI	Requirements Sourcing Select Negotiate (Refine ROI)	Project Plan Design Develop Integrate Test Pilot/Rollout	Monitor Maintain Manage/Apply (Assess, validate, refine, extend to optimize)

FIGURE 2: Contact Center Technology Support and Management Activities

STRATEGIC PLANNING
- Sourcing
- Architecture
- New Business Needs

DAY-TO-DAY CHANGES
- Technology Driven
- Business Driven

- Business Continuity/Disaster Recovery
- Security/Compliance

PROACTIVE MANAGEMENT
- Testing
- Monitoring

REACTIVE RESPONSE
- Trouble Tickets
- Resolution

OPTIMIZATION
- Root Cause Analysis
- Trends

ACTIONS   ACTIONS

engaging others across the ecosystem. This collaboration should apply throughout the implementation phase and beyond. FIGURE 2 provides examples of the things you need to collaborate on for ongoing support and management.

Vendors are an increasingly important part of the collaboration and relationships needed for technology success. Cloud solutions, managed services, and solution capabilities that require specialized expertise all elevate the vendors' role in helping centers succeed with today's technology. Examples abound: artificial intelligence applications, complex user interfaces for things like bots, workflows for process automation, and network and data services for fraud prevention, compliance, and authentication, to name a few. So, as you pursue solutions that have high reliance on the vendors, make sure things are well-documented and communication channels are wide open. Convey that you need them to be a trusted partner (not "just a vendor!") and actively manage them to focus on and deliver capabilities that meet your specific needs.

One more thing to keep in mind is that in our fast-changing industry, you must keep up to date, together (CC, IT, vendors and others—like the risk management team), so you can apply new capabilities in a timely manner. Sign up for vendor email updates, go to vendor events, network and learn. And do it together with your IT/CC counterparts!

Do… the Hard Work

I'm taking the positive approach and labeling this list with "Do" instead of "Don't do," but the messages here come out of problems we've seen countless times. Here's the list of underlined important things to Do:

- **DEVELOP A STRATEGIC PLAN**, document it, socialize it and keep it up to date.
- **BUILD A BUSINESS CASE**, and while that means financial analysis, in many cases, some initiatives can be justified as "must do"—such as reducing risk or remaining competitive.
- **CAREFULLY SELECT YOUR VENDORS**, because they are more than just a commodity provider; consider functionality, technical issues such as architecture, integration, and redundancy, implementation and the services that go with that step, and support and how they stand behind their product.
- **CREATE A PROJECT PLAN** of your own for each project (don't just rely on the vendor's plan); address the people and process changes that go with the technology implementation.
- **MAKE CHANGES DAY ONE** and define and pursue phases as appropriate. I can't emphasize this one enough—do not just replicate what you have when you implement new technology!
- **ENSURE INTEGRATION** is part of the plans and implementation so that your systems work together, and your agents aren't the integration point.
- **TEST APPROPRIATELY** because you know what happens when you *assume* it will all work just fine!
- **MAKE SURE YOU'VE PUT THE PEOPLE AND PROCESSES IN PLACE** to use and manage the technology effectively (frontline and support).
- **MAKE ROLES AND RESPONSIBILITIES CLEAR** (again, document, socialize, update)—for implementation, configuration changes, support, testing, monitoring, etc.
- **DESIGNATE TRAINED, QUALIFIED PEOPLE**, and give them time to apply and support technology (not an "in your spare time" job!).
- **FOLLOW UP** to make sure your ROI is being achieved, and adjust if it's not.
- **ACTIVELY MANAGE VENDOR PERFORMANCE** and hold them accountable.

The Relentless Pursuit

Contact centers are by nature very reactionary, with legendary "fire-fighting" skills creating many a great customer success story. However, one of my frequently used lines is, "the tactical swamps the strategic." Getting technology right is about not letting the day-to-day fire drills stop the ongoing activities to plan for, implement and optimize changes. This *relentless pursuit* is perhaps the most compelling, single thing that needs to change with contact center technology. The passive, in our spare time, we'll get to it later approach has held centers back from achieving their goals for too long.

Use the "Do" list and our "Top 10" checklist (SEE THE SIDEBAR) to get everyone *on the right page and on the same page* to drive technology success and value. The time you invest should pay dividends noticed by your staff, your execs and your customers. ⊛

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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.

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