GETTING YOUR TECHNOLOGY ON TRACK

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Contact Center
Pipeline

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Plan to make smart progress, not just fast progress.

BY LORI BOCKLUND, STRATEGIC CONTACT

Contact center (CC) technology has become incredibly alluring. Cloud solutions, artificial intelligence (AI), low code/no code, application programming interfaces (APIs) and more promise quick fixes to long-standing issues or gaps, often at affordable prices. Chronically stretched thin, CC management can get lulled into a kind of *magical thinking* that if they simply move forward with these solutions, everything will come together. While speed is exciting, it can sometimes take you off track. Countless centers wind up with non-integrated point solutions, marginal utility for users, administrative nightmares and/or outright failure.

This article explores the dynamics that keep centers from the planning table as well as the challenges they face when forging ahead without a roadmap. It also provides practical advice for finding a sensible path forward so that you can move with speed *and* confidence that you will reach your intended destination.

Why Technology Planning Gets Sidetracked

As noted in my March article, [What Execs Want: How to Respond to Visionary Ideas](), today's "hot technologies" target business challenges that grab senior leadership attention—e.g., staffing demands, performance improvement, cost containment, revenue drivers, customer satisfaction. For example:

- Bots purport to deflect loads of calls, chats and text messages

- AI improves routing, workforce management, desktop tools and workflows
- Omnichannel solutions give customers the means to engage with centers using their preferred channels, lowering the level of effort and increasing affinity with the company and its products
- Analytics yield insights to deliver personalized customer experiences and realize operational efficiencies
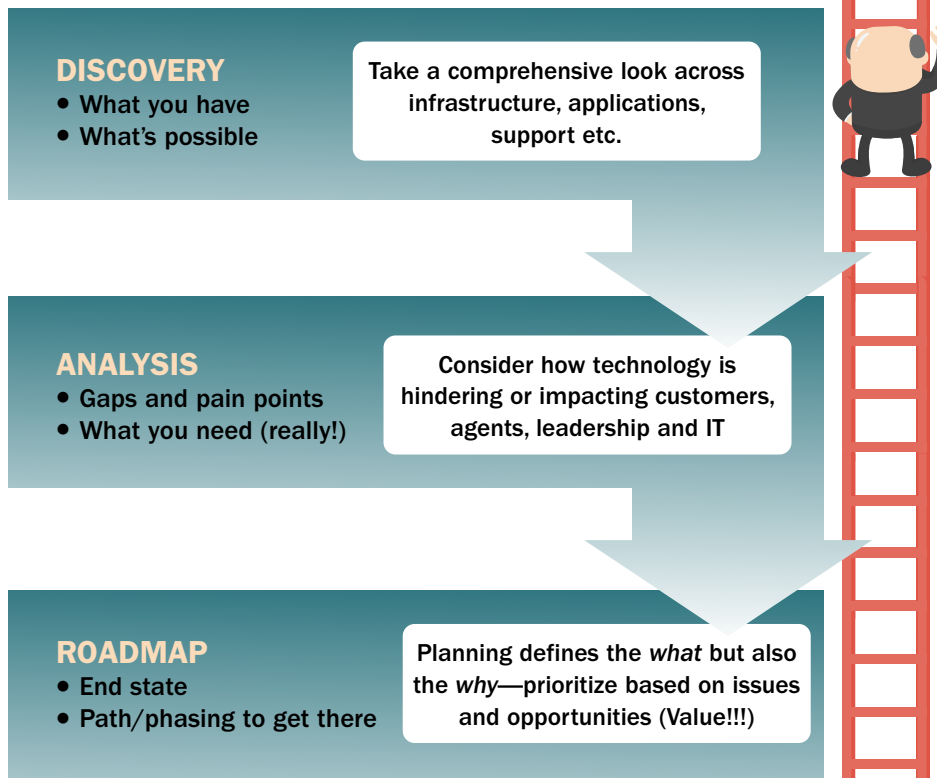
When top-down pressure combines with bottom-up enthusiasm, projects often find funding without ever answering some fundamental questions: How does this initiative fit within our short- and long-term business strategies? What problem(s) are we trying to solve (and are they the most urgent ones)? How will this improve the customer experience and/or our efficiency and effectiveness? And how will it integrate with our existing technology?

It can be easy to bypass the tough questions. API-first solutions give you the means to integrate diverse technologies and adapt features and functions to your needs. Apps can be configured readily using an intuitive user interface and some offer industry-specific content straight "out of the box." Constant innovation suggests a level of agility that prepares centers to implement the "next big thing." Technology can seem more like Legos and less like complex instruction sets and streams of data that must be fine-tuned to work harmoniously.

Today's financial models also encourage leap-before-you-look sensibilities. Vendors

DISCOVERY
- What you have
- What's possible

Take a comprehensive look across infrastructure, applications, support etc.

ANALYSIS
- Gaps and pain points
- What you need (really!)

Consider how technology is hindering or impacting customers, agents, leadership and IT

ROADMAP
- End state
- Path/phasing to get there

Planning defines the *what* but also the *why*—prioritize based on issues and opportunities (Value!!!)

offer free pilots and options to bill on a month-to-month basis. (Of course, they'll sweeten the deal if you agree to a multi-year contract!) A vibrant marketplace provides a gaggle of downloadable applications that can be implemented with little fanfare. The purchase process contributes to the impression that technology no longer requires much foresight or effort (and certainly not IT!), and you can change course on a dime if things don't work out as anticipated.

Speaking of IT... Cloud-based solutions fan the flames by helping CCs bypass one of the biggest technology-related issues they face: limited IT resources. With vendors providing services that used to be done in-house, IT focuses on applications that are mission critical for the organization as a whole and lets the business unit (like the CC!) fend for themselves. While getting out from under IT's yoke may seem appealing, CCs risk losing a valued team member at the planning table who might ask some gnarly technical questions and make sure that all of the pieces will fit together nicely.
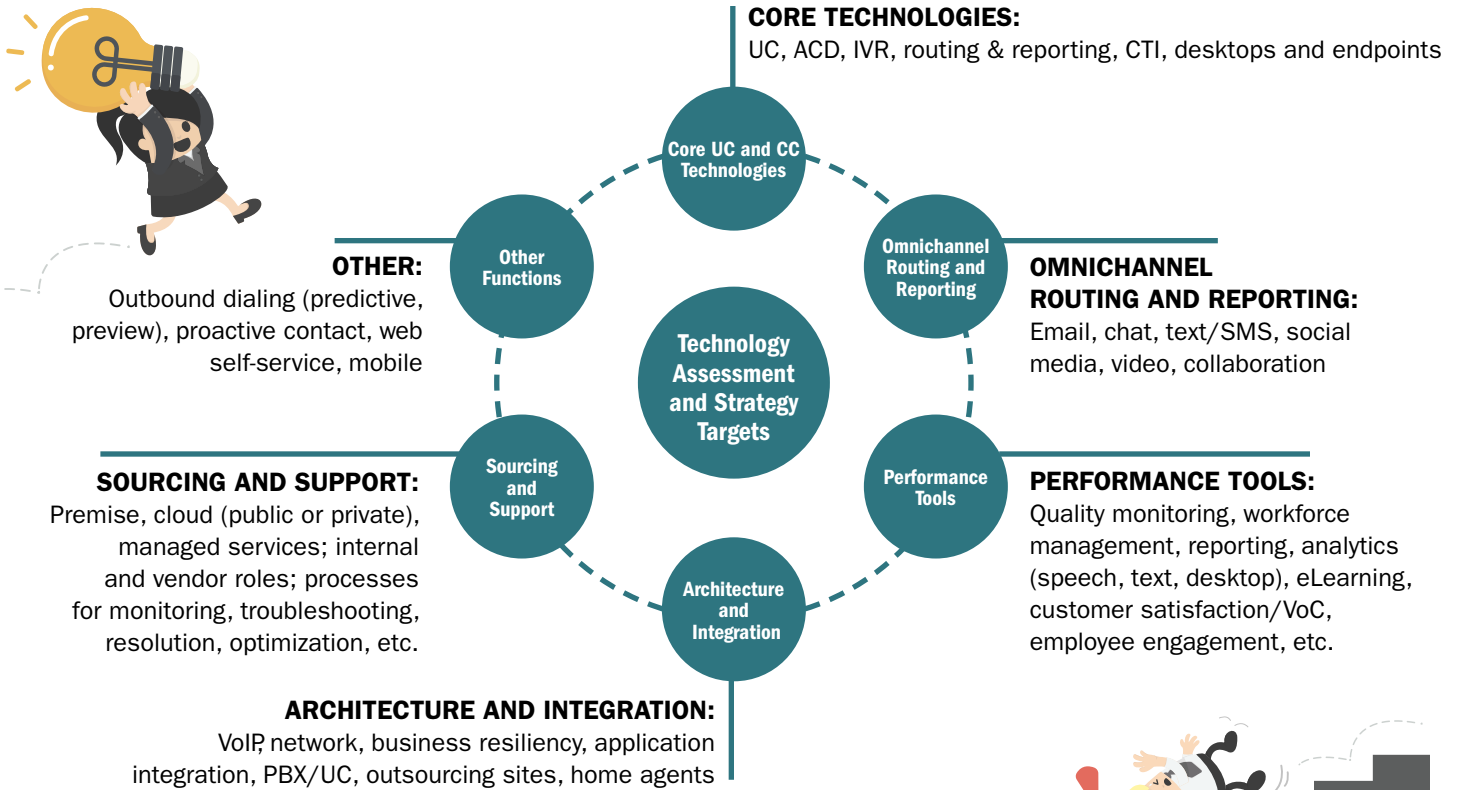
Even if some of these concerns cross your mind, you may still fall prey to the ultimate in *magical thinking*: "I don't have time for (or don't need or don't know how to develop...) a plan, roadmap or cross-team evaluation. We are moving at light speed, and I need to seize the moment and pursue the technology we're so excited about!" You dive in on a wing and a prayer and hope the ROI will pan out.

What Happens When Things Go Off the Rails

Whatever short-term benefits accrue to the quick-and-easy implementations, the longer-term consequences of supporting non-integrated point solutions are troublesome. When the technology to run email and chat does not work with the main CC system, you cannot route, handle, report and optimize customer contacts within a common pool of agents or deliver that omnichannel customer experience. Workforce management, quality monitoring and other workforce engagement tools are hard to tie in across channels. And with more applications on which to train and support, you increase frontline training while making their jobs more complex and harder

to master. In short, you give up lot of ground on efficiency and effectiveness within your highest budget line item—labor.

You may have bought into the idea that all of your mix-and-match solutions will work together seamlessly, whether through vendor promises, selection of top-tier solutions, or that "magical thinking" referenced earlier. Yet countless centers wind up with manual workarounds because things don't talk to each other as promised. Even in the best of worlds, you wind up with many different moving parts to maintain. And what happens when the internal expert leaves the position? Who will become available to pick up the slack, and how will that person get trained?

Speaking of support personnel, countless projects go from enthusiastic concept to reality without the benefit of the resources to do it effectively. They lack well-conceived plans for structuring the effort, measuring its utility and instituting continuous improvement. Project approval rests on the false belief that someone will take care of the details in their spare time. Knowledge management presents a solid case in point. Absent a plan to determine what information should be included in the portal and how it should be organized and maintained, folders and files may still rapidly accumulate. However, if no one vets the content and there is no plan to ensure it stays current and relevant, the tool can be rendered useless (if not detrimental) in short order.

When every line of business gets free rein to purchase whatever technology suits their needs, they miss the opportunity to realize the value, efficiencies and economies of scale of a cross-enterprise solution. Worse yet, the customers and contact center agents become the points of integration. Customers experience the company as if it were multiple organizations with different messaging, services and content, and agents do their best to serve a customer for whom they may only know part of the "journey" or value to the company.

Given all the foregoing, it's easy to see why so many centers wind up with overinvested, underutilized technology. That is not anyone's goal with a single solution, much less the collection of capabilities needed and used today.

FIGURE 2: The Scope of a Technology Plan Can Include Many Elements, Such As:

CORE TECHNOLOGIES:
UC, ACD, IVR, routing & reporting, CTI, desktops and endpoints

OTHER:
Outbound dialing (predictive, preview), proactive contact, web self-service, mobile

OMNICHANNEL ROUTING AND REPORTING:
Email, chat, text/SMS, social media, video, collaboration

SOURCING AND SUPPORT:
Premise, cloud (public or private), managed services; internal and vendor roles; processes for monitoring, troubleshooting, resolution, optimization, etc.

PERFORMANCE TOOLS:
Quality monitoring, workforce management, reporting, analytics (speech, text, desktop), eLearning, customer satisfaction/VoC, employee engagement, etc.

ARCHITECTURE AND INTEGRATION:
VoIP, network, business resiliency, application integration, PBX/UC, outsourcing sites, home agents

Diagram labels: Core UC and CC Technologies; Other Functions; Omnichannel Routing and Reporting; Technology Assessment and Strategy Targets; Sourcing and Support; Performance Tools; Architecture and Integration

How to Get Back on Track

It may not be what you or your leadership want to hear, but the key to getting on track is to pause for a moment and spend some time making a plan. A self-assessment doesn't have to take a long time or be overly burdensome. The key steps outlined in **FIGURE 1** can get you started, and **FIGURE 2** gives you some triggers for what to include in the scope.

Start with a comprehensive look at your environment and what the market has to offer—both in products and best practices. Then do the analysis, considering where your current technology falls short in terms of efficiency, effectiveness and/or missed opportunities. These steps will set you on course to respond to questions like these:

- Where is technology hindering instead of helping?
- What causes frustration for customers, agents, supervisors, leadership and/or IT?
- What do these same constituents *expect* based on what they experience elsewhere or what they've heard about other organi-

zations?
- Where are our gaps, and how do we fill them?
- How do the things about which we are getting excited fit with what we have?
- What should we do first based on value, pain points, interdependencies, etc.?

It all boils down to being able to answer a fundamental question around strategic alignment: What is our end-state vision for the business and operations (customer experience, employee experience and all that important stuff!), and how should technology *enable us to achieve that vision*? Ultimately, that is technology's role and the primary basis on which you should justify a project and the associated investments.

Building a technology roadmap can be fun and enlightening. You can do it with an engaged, internal cross-functional team, or you can seek the help of trusted partners—vendors, Value-Added Resellers, consultants. The latter can provide subject-matter expertise and minimize time away from your day job. Regardless, engage in dialogue with your

primary vendors; a key to technology success is all the pieces working well together. Your scan of the market during discovery may also introduce you to some intriguing new vendors or partners.

Once that plan is defined, document and discuss it with your peers across the enterprise to get on the same page. Then you can go to leadership with a consistent message about priorities and investments. Soon you'll all be on a united path to deliver on those great customer experiences that every contact center yearns for. ⊕

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