GUIDING YOUR CLOUD IMPLEMENTATION

Guardrails to keep your technology project on track.

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The guardrails that keep your technology project on track.

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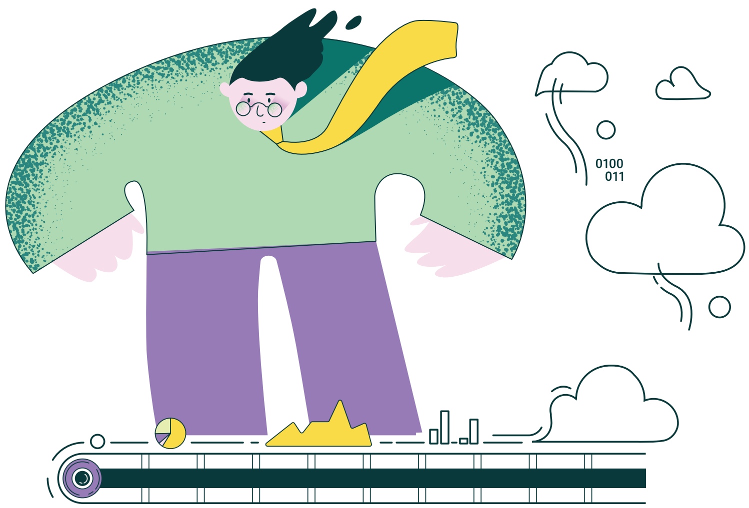

We have had the pleasure of helping many clients implement cloud contact center technology solutions over the last few years.

The market has matured to the point where the vendors have their processes well-defined. The journey, from start to finish, appears straightforward after selecting a vendor and a solution, signing agreements, and getting the kick-off call scheduled.

But anyone who has implemented technology knows the path is rarely without a few bumps along the way. We hope our insights will provide a handy guide to get you through your project with as few detours as possible.

I start with a few themes that impact the main stages of the process. Then we'll move into the top 12 tips (10 just wasn't enough!)

Themes

Here are seven themes that should be pillars for you and your implementation teammates.

1 APPROACH WITH CAUTION. A successful implementation really starts as you work through the agreements that define what you implement and how. It may be tempting to sign in a hurry with minimal review and maximum trust: after all, the vendors have done these projects many times! Yet you do so at your own risk as it is the rare project that is not going to have some unique needs. So read, review, comment, iterate. It's important to get things right up front.

2 ENGAGE ALL RESOURCES. Those that need be involved in or will be impacted by the project, including IT (architecture, desktop, CRM development and integration, network), marketing, and of course, the contact center. This need starts right out of the gates with the documentation review and continues through the life of the project.

3 BE YOUR OWN ADVOCATE. A good sales rep will stick with the project and advocate for you, but you can't always count on that. Engage project management, sales, and even vendor leadership as soon as you see any issues or risks.

4 GO WITH THE FLOW BUT INFLUENCE IT AS WELL. Vendors have very structured processes, e.g., steps, timelines, sign-offs, and you need to fit in to those. But you also need to ensure the process addresses your requirements (see advocate theme!) The top tips provide some important examples where you need to make sure the vendor process focuses on your center. And you may need to perform some specific tasks on your side to align your internal project plan with the vendors' project plans.

5 BE PROACTIVE. Don't wait for the vendor kick-off to start making decisions on call flows, architecture, desktop, which numbers to port over, etc. Lists and checklists are your friends. Think about the many things that will impact your project, such as:

Components of a Successful Statement of Work

- Scope
- Approach, Tasks
- Staffing, Roles and Responsibilities
- Timeline
- Design
  - Technical—e.g., architecture, network, endpoints, onsite equipment, integration, etc.
  - Functional—including call flows, skills, menus, self-service, desktop, reports, etc.
- Outcomes and Deliverables
  - Solution documents
  - Testing
  - Training
- Logistics
  - Acceptance criteria
  - Change control
  - Issue resolution
- Cost

- What does your internal technical team need to do to integrate into the various systems (e.g., CRM)? What will the vendor do? Do you need third party partners to assist?
- How does the solution fit with your desktop environment? Will you use a browser? Do you require a VPN? Remote/virtual desktop? What will you use for the voice path?
- How does the solution fit in with your Dev/Test/QA environment(s)?
- What data (e.g., workforce management (WFM), call recordings) needs to be imported or available day one?
- Who will script and record messages such as prompts, on-hold music/messages, delay announcements, etc.?

6 BEWARE OF BOILERPLATE (VENDOR STANDARD STUFF).

Chances are the vendor will start with it. You need to make sure they do their work taking discovery input to create the specifics for you. The other themes will help you fend off complacency that increases the risk of missing important details.

FIGURE 1: Considerations in Negotiation/Agreements

- Contract Term (e.g., none, 1 year, 3 years)
- Licensing and Payment Structure (flex!)
- Licensing Fees by Media or Function
- Statement(s) of Work
- Implementation and Pro Services Fees
- Toll-free, Inbound and IVR Usage
- Others: Network, Hardware, etc.

7 DO NEW AND BETTER THINGS!

The easiest and fastest path to cutover—for you and the vendor—is to recreate your current configurations on a new platform. But now is the time to do the hard work to get value from all this exciting new technology. Discovery, design sessions, and best practices all play a role in getting you on the right path.

Twelve Tips

Now that you are armed with some pillars, here are the top 12 tips we can provide as you pursue cloud contact center technology.

1 SOW.

The Statement of Work (SOW) describes the professional services you are signing up for. You need to get beyond the boilerplate and make sure that the SOW thoroughly covers all the elements of your solution pursuit. Do not be surprised if it takes a few rounds of review and refinement. If the vendor's style is to use separate SOWs for different elements (e.g., omnichannel, analytics, bots), make sure the scope is clear, comprehensive and fits together. Use your requirements lists to check the SOW(s).

2 SERVICE ORDER/PURCHASE ORDER.

The vendor will have some sort of "Order" that defines your license counts, term (date agreement starts and ends), renewal, etc. The same messages about careful review and refinement apply. If your license counts change seasonally, or you have other peak scenarios, that will be a key element to review and negotiate.

3 TIMELINE.

Vendors love to say how fast they can implement during the sales process. Once you sign you may have to push to get a project manager (PM) assigned and get the project kicked off. Make sure the PM has proper experience (I like to look at LinkedIn!) and the time available (not overloaded/overbooked). Make sure your team is ready to commit to the project timeline too!

4 THE PROJECT MANAGER.

Speaking of the project team, the vendor's PM should know the product(s), processes, documentation, etc. but they should also take the time to understand your environment through the SOW and Orders. They should also make it clear who their team members are and define their roles, such as subject matter experts (SMEs) for various products/SOWs.

5 PROJECT DOCUMENTS.

There are many documents, and we'll cover critical ones below. From the start, make sure you understand all the deliverables, who provides what content (and in what format), and which ones require a sign off process. This understanding ties into the SOW as well as the project kick-off and project plan.

FIGURE 2: Key Steps in Implementation

6 THE PROJECT PLAN.

The project plan(s) need to cover the specific steps. Separate plans may be used as appropriate for different solution elements (e.g., omnichannel versus workforce engagement management (WEM) versus bots). Carefully review them, push for clarity in steps, owners, timing, and dependencies, and make sure they are kept up-to-date.

7 WORKBOOK.

The workbook is all about the details and defines basic configuration inputs, including some tedious details such as all the agent names and logins, groups/skills, holidays, phone numbers, etc. Your team needs to be ready to provide the specifics of your environment: as envisioned, not just as it exists.

8 BUSINESS REQUIREMENTS DOCUMENT/FUNCTIONAL SPECS/ CALL FLOWS.

This very important document can have a variety of names, but regardless it is the key document (or documents, if multiple products) that defines what you want to do (beyond workbook details).

Our themes are really important here: unique to your world, leveraging best practices, and iterated for completeness and clarity. It typically requires sign-off (from your designated project contact) and defines what is configured and tested. It can include:

- Call flows, bot logic, etc.
- Omnichannel, namely what is done where (especially if you are doing some channels in other solution elements like Salesforce)
- Integrations, e.g., desktop
- WEM, WFM, quality monitoring (QM), analytics, etc.

9 PORTING.

Porting is the process for moving your numbers (local and toll-free) from one system (and vendor) to another. Things can and do go wrong at various stages of this process, so work on it early and tap the vendors for help.

The outgoing vendor can provide service requests and bill details to make sure you provide the right inputs to the new vendor. Recognize that the cloud solution vendor may not be the carrier and may have little clout with the carrier.

They (and you!) may be very dependent on these third parties for success. This lack of control can mean they can't define the cutover date and time to your liking. The plan is often to temporarily forward numbers from your old system/carrier (another thing to plan), test carefully on cutover, and then test again when the port actually goes through.

10 TESTING.

A variety of tests are critical to success. Understand what the vendor will do both in testing and providing test cases (see SOW). Tee up your team to do this detailed work: develop (many, detailed!) test cases, run the tests, fix things, run again. Assign your User Acceptance Testing (UAT) team early and set expectations.

Test outcomes is another area likely to require sign-off. And keep in mind most vendor project plans don't put enough time for this step, so push back on that. Tip #9 mentions how the porting timing may lead to additional testing.

Similarly, if you use text-to-speech temporarily, you will want to retest when you populate professionally recorded messages and prompts.

11 TRAINING.

Training addresses the needs of all user types—agents, supervisors, administrators—and support functions such as WFM and QM. Most vendors make their online training a prerequisite; you need to make sure everyone does it!

Recognize training is short, especially for agents and supervisors but it is critical so make sure it gets scheduled for all. Administrators are the main users for configuration, reporting, advanced applications (e.g., WEM) and may get a few sessions. Ideally, they also receive some hand-holding for at least a few weeks as you use the applications in production.

12 CUTOVER AND AFTER.

Most vendors have a pre-cut checklist to make sure all is well—including testing, training, porting or forwarding—prior to cutover. You and they will provide support for agents at cutover, even if they are remote.

Some contact centers (e.g., those with hybrid setups for some people on-site) ask people to come in for cutover as it is easier to assist them.

Make sure you have the vendor PM and SMEs engaged for a while after cut (more than just a few days!) so you can address issues and questions and optimize your use of what you have purchased and implemented.

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