

WHAT EXECES WANT: HOW TO RESPOND TO VISIONARY IDEAS

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The next time your leadership asks you to pursue a new technology, consider it opportunity knocking.

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Executives regularly ask contact center and IT leaders to explore (or pursue) technologies that could benefit their organizations. Some of these ideas come from things they hear from peers or vendors. Others result from their own research or exposure to analyst perspectives that speak to innovation and disruptive change in the contact center and customer experience (CX) industries. These ideas target common business challenges they face—containing costs, hiring to address growth or performance improvements, driving more revenue, and getting the coveted uptick in Net Promoter Score or other key indicators.

As we look at several common requests, keep an open mind and bring the “can do” attitude that your executives expect. Whether

your charge is to *consider* it or *just do* it, these suggestions are unlikely to go away just because you are too darn busy, have too many other projects to tackle, or think some of them too far-fetched or ill-suited to your environment.

Technology Ideas

It would be tempting to frame this discussion around hype versus reality and confine ourselves to the technologies that have proven track records. But since executives do not limit their inquiries to the tried-and-true, we won't either. Here are the ideas that we hear on countless projects.

BOTS

Everybody thinks if only they had a bot, it

would deflect loads of calls, chats or text messages and solve many of the center's problems. While that expectation may be exaggerated, there is undoubtedly great hope in these self-service tools. Numerous vendors offer them, and many include options to leverage Amazon Lex, Google Dialogflow or their own tools.

Your path to a bot starts with understanding the pieces of the puzzle and how they fit with your environment and the application opportunities you see, i.e., which channel(s), which applications, what data the bot needs to access, who will manage and optimize the technology, and so forth. When you identify a promising opportunity, explore bot options from existing vendor partners and see if you can do a pilot for a simple application on one channel. Configure the bot to default to human assistance when needed—with integration that passes any information already gathered. Then learn and expand from there!

ALL THINGS ARTIFICIAL INTELLIGENCE

While bots may be the most famous form of artificial intelligence (AI), the appetite for AI runs much deeper. Since it is so hyped, you may find that you need to cast a wider net on potential applications. If that is your charter, start with a broad survey of the possibilities, including:

- **ROUTING** of both inbound and outbound contacts based on data about the customer, the current state and what drives results.



- **WORKFORCE PLANNING AND SCHEDULING** that can do deeper analysis of patterns and predictively define how best to match staff to workloads.

- **SMART DESKTOP TOOLS** such as “next best actions” and intelligent knowledge tools that can serve up and optimize information.

- **ANALYTICS** to provide more insight than ever before and help you identify the next great change to make.

With your AI wish list in hand, you can then pursue specific solutions to help your center get smarter and run more efficiently and effectively.

THE NEW OMNICHANNEL: DIGITAL FIRST

“Omnichannel” is finally hitting its stride. It seems nearly every customer contact website offers chat sessions, and many companies provide two-way texting. Social media has expanded beyond Facebook and Twitter. Still, voice remains the dominant channel in many (most?) centers. As such, you may find yourself nudged toward a focus on digital that doesn’t align with your customers’ current channel preferences.

My advice is to embrace digital channels without compromising voice. First and foremost, that means working toward implementing truly integrated routing and reporting solutions. *No more silos!* If your voice and digital channels reside on different platforms, strengthen the integration between them to enable shared agent support (with proper training) and performance management (QM, WFM, etc.) across channels.

DATA AND ANALYTICS

This topic does not enjoy the same novelty or hype as others, but we’re seeing a surge in centers making more use of customer data alongside contact data, wherever each may reside. Interested executives may focus on personalization, upselling and cross-selling, or increasing lifetime value. And they may ask what insights you have into what is working and what isn’t, and what changes need to be made as a result.

With that charter, the theme of integration emerges yet again. We aren’t talking about dumping data into Excel, performing manual (and error-prone) manipulations and

An Underlying Theme: People, Process and Technology

In all these exciting opportunities, there is a familiar mantra you will need to embrace to succeed—People, Process, Technology. You can buy the latest, greatest technology or services, but if you don’t do the right things with people and process changes to go with it, you will fall short of your goals and executive expectations.

HERE ARE A FEW THINGS TO KEEP IN MIND:

- Plan carefully, even in a just-do-it, fail-fast, whatever you or your leadership wants to call it pursuit. You need to make sure that all the pieces are in place before you move forward.
- Start small/simple; learn, and extend. Pilot where appropriate, and define phases where possible.
- Specify success metrics so you can objectively assess whether or not all the excitement was justified. Then make prudent decisions about what is next, whether that is tuning and optimization before further rollout, or termination because it just isn’t working out or paying off.
- Apply change management. Change management will undoubtedly make projects around any of these ideas achieve better outcomes, and in some may be the difference between success and failure. (See my March 2020 article, “[Change Management May Be the Most Important Part of Your Next Project.](#)”)

spitting out reports. We’re setting our sights on powerful analytics tools—i.e., Power BI, Tableau—that tap data from many sources, make connections, surface trends, support deep dives, and drive out insights that can enable achievement of lofty goals. Then it’s up to the contact center to turn insights into action, whether it be routing changes, use of bots and AI, more cross-training to the right channels, or putting more information into agents’ hands quickly and automatically. Basically, this initiative provides a foundation for all the others we’ve covered so far!

LOW CODE/NO CODE

This buzz phrase is on the tips of most vendors’ tongues today. It promises to enable business users to do more, faster, and relieve IT of another burden for which they don’t have time. What’s not to like about that?!

Executives expect to get advanced capabilities from today’s solutions without growing IT. They may be right. However, you need to identify the resources who will learn these new tools and do the configuring, analyzing and optimizing. You may be able to leverage internal staff (e.g., business analysts), man-

aged services from the vendor, or some combination of the two. But don’t move forward under the assumption that you’ll figure it out later or that someone will do it in his or her spare time. You also need to recognize that IT won’t be fully off the hook. Keep them in the loop and engaged for when and where they are needed.

BETTING ON THE INNOVATORS

I included this last one because we’ve seen some technology selection driven by the simple belief that large, highly innovative companies like Google and Amazon that have entered into the contact center space will out-innovate longer-term players, regardless of their pedigree, size, ecosystem or leadership. It’s an interesting bet that I personally wouldn’t take either way. Many companies have entered the contact center space and learned that it takes time to build up a full-function solution and compete with today’s top-tier solutions.

The good news is that innovators partner with entrenched players on many fronts, giving you the opportunity to get the best of both worlds (e.g., platform choices, integra-

Choose Your Partners Carefully and Maybe You Can Have It All!



We've watched the sourcing debates evolve over the years—premise vs. hosted/private cloud vs. public/multi-tenant cloud, buy vs. build, best-of-breed vs. suite—with trade-offs and compromises aplenty. The reality is that most companies end up with some combination of these sourcing alternatives as they migrate over time, replace some elements but retain others with significant investments, and take advantage of what the vendors offer.

As you **PLAN** for technology, it pays to have sourcing strategies that are rooted in the current opportunities that vendors offer—things like API-first designs, “connectors” to other solutions, tools to configure and extend capabilities, and broad ecosystems that include products and services.

As you **SELECT** technology, pick the partners carefully to fit into that strategy, based on the solutions they offer, the alliances they keep, and the services they provide to back it up.

As you **IMPLEMENT AND OPTIMIZE**, marry the partners' offerings with your internal roles. Include contact center support functions that may do more to configure, manage and apply technology to business needs. Incorporate IT resources that provide additional support for technology use as well as infrastructure, security and more.

tions). And those already making this bet are providing lots of input to the future of the products. Moreover, outside innovation lights a fire under the insiders, so perhaps we truly get a “win-win” on this one, regardless of which bet you make.

Operational/Organizational Ideas

The following three ideas are not technology-specific, but crop up frequently on client projects. The first two need to be examined in the context of what you intend to do with the technology items outlined above. In particular, will bots and AI transform your center in such a way that you don't need outside help from gig workers or outsourcers? The last one—work from home—may prove more attractive as you put some of the other exciting technologies into place, with agents that ramp up faster and have better tools at their fingertips.

GIG WORKERS

This topic is perhaps the hottest of all: If only you had a pool of (non-employee) resources at the ready to help with the ebb and flow of volume. Passionate customers could help other customers, and everybody wins! It's a spinoff of concepts like Uber and AirBnB that

have proven so effective in disrupting their respective industries. As far as I can tell, this idea first gained traction in customer service through gamers helping gamers.

While I find a disruptive force exciting with its potential to address so many common contact center issues, I'll throw a caution flag and ask you to do a bit of awareness-building with your executives. They need to understand the length of training and time to proficiency, the volume of contacts that are real-time (voice, chat, text) versus have the luxury of time (e.g., email), the need for quality review, and liability exposure for poorly handled contacts. You should explore technologies for gig worker access, integration and security only if these considerations can be addressed effectively.

My current posture is to advise clients to watch and wait to see if gig workers take hold in similar industries for the types of contacts they need handled. We may also need to see if it remains a third-party resource as it is today, or becomes viable and attractive for companies to hire gig workers directly.

OUTSOURCING

I wrote an article way back in 2013 titled, “Can't We Just Outsource It?” I still share that article with clients who have leaders

thinking that is the easy answer for their center. While it's an eight-year-old article, the concepts summarized in the subtitle still apply: “Outsourcing has its place. Know what it takes to get it right.”

Yes, outsourcing may be a great fit for your center, but you have significant decisions to make about what channels and contacts you might offload. Then, the Statement of Work, Service Level Agreements and Account Management are still the keys to success in working with any partner that is going to be the face of your business to your customers.

WORK FROM HOME, FOREVER

Most centers have moved some (or all) staff to work from home. Many will struggle with what comes next: Do we move them back to the center? Do we make WFH a standard part of our staffing strategy? Can we then have staff anywhere, or only close by?

The answers to those questions are not easy, and must consider culture, legal and HR policies, security and liabilities, etc.—things that were likely not a key part of the decision about what to do when COVID hit. My hope is that every center that has had success with WFH will take a careful look at its role and value in their strategic plans going forward, and address the gaps that may have been created when it was done fast (as opposed to done *right*).

When Opportunity Knocks

The next time your leadership pings you on your messaging platform or has an agenda item for your one-on-one that makes you think, “Oh no, here's another one of those ideas...”, consider it opportunity knocking. You get to dive in and learn, explore and lead. Not every idea will pan out, but some may prove transformational. Regardless, you'll be a wiser and better contact center leader as a result! 🍀



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