THE CHICKEN AND THE EGG: HOW IT AND THE CONTACT CENTER SUCCEED TOGETHER

Solving the IT/Contact Center dilemma: Which comes first, the business requirements or knowing what's possible?

By Lori Bocklund, Strategic Contact

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IN 20 YEARS of consulting and hundreds of projects, I have seen some typical scenarios play out in client environments, often based on the communication and collaboration—or lack thereof—between IT and the contact center. Stalemates ripe with finger-pointing are common situations. IT stands in one corner declaring "tell me what you want to do." Contact center leadership stands in the other corner, desperately seeking to know "what's possible" with technology—whether it be what they have, or what their vendors or the market have to offer. The net result is a distinct lack of progress and frustration on both fronts.

While it might appear there are some easy solutions to these issues, nothing is ever as simple as it seems. In this article, my goal is to reveal some of the best ways to help end the stalemate, bridge the gaps between IT and the business, and move forward together.

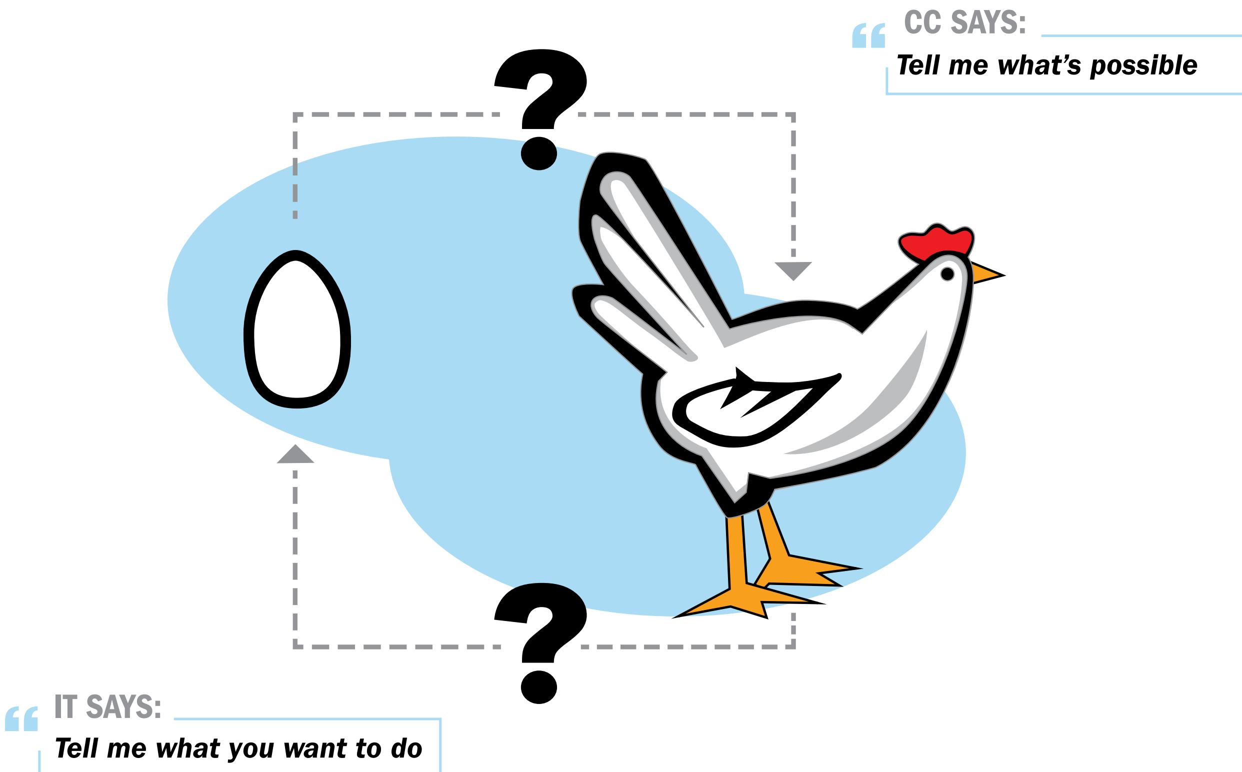
Business Says, "Tell Us What's Possible"

Most centers desire new technology to help them meet their goals: delivering better service, driving sales and managing costs. They hear about technology in many ways, but often without much depth or specifics to their world. They talk to others, subscribe to industry publications (like *Contact Center Pipeline*!), and read about what others are doing and how they are using technology. They attend conferences or local networking events, WebEx demonstrations, site visits, etc., and hear about the "latest and greatest" capabilities. They may even meet with vendors, especially now that hosted or Software as a Service (SaaS) options give them new possibilities, often feeling like they can proceed without IT. They also pay attention to their experiences as consumers and consider how they might offer some new capabilities to their customers. So they get all these wonderful ideas about what they could do.

But many centers struggle to get their "wish list" well defined, clear and consistent with IT priorities. They face issues creating the list within the center: too many items, unclear items, not clear which problems they are solving, etc. So IT has to move forward with limited input from the center and do the best they can. Or centers may hit a variety of roadblocks with IT: not that, not now, not here, not in line with other things we're doing. For example, IT could be focused on a vendor that may be a good fit for the enterprise but not necessarily what the contact center had in mind. Other times, there is not an IT plan with which to align. And if IT is too busy to craft its own plan, they can't be sidetracked to help the contact center create theirs. Sometimes, the contact center's ideas are taken as input, but the next steps are unclear.

There is usually a great desire from the center to have IT tell them what's possible. A phrase we often hear is, "We don't know what we don't know." To some that sounds like a humble admission that they would like some input; to others, it sounds like a cop out. Every company needs to define who has the responsibility to drive that knowledge and understanding, and what mechanisms will ensure that it happens routinely (see the sidebar, "Top Ideas for IT and Center Alignment"). Regardless, centers genuinely want to know: What's possible with what we have? What's possible from our current vendors? What's possible if we look at other vendors (including those that IT might "approve" and others that we may have uncovered)?

Unfortunately, lacking specific action plans, sometimes "rogue projects" emerge. The contact center tries to pursue something on their own, such as point solutions for performance tools (QM, analytics, workforce management, etc.). Or they may pursue hosted/SaaS solutions, which may feel independent of everything IT is doing, but in reality, have to integrate with and leverage other applications and infrastructure. Trials and introductory offers as close as the click of a button further tempt operational leaders. In some cases, the center hopes to leverage an existing premise solution, but it may require upgrades or integration. The seemingly easy, plug-and-play



IT and the Contact Center can get stuck in the "chicken and egg" dilemma

FIGURE 1, ABOVE

project may be a bigger deal than they realize and ultimately run into similar roadblocks due to the need to work with the rest of the IT/contact center technology infrastructure and the reliance on IT resources to make it happen. The imperative to collaborate and align surfaces no matter what the path.

IT Says, "Tell Us What You Want to Do"

While all that wishing and hoping and planning is going on in the center, IT is busily pursuing projects and making plans based on what they know about requirements. They may have a master plan or list of projects that addresses a wide range of enterprise needs, showing just how busy IT is and will be. Unfortunately, they may be missing the mark on contact center needs if the IT and contact center vision and plans are not integrated.

IT may sincerely think that the center has all it needs for now ("no news is good news..."). Or they believe the current vendor solution is working, so they proceed with the next upgrade or maintenance obligation to deliver functionality and maintain a stable, reliable environment. Because they are working under time, resource and budget constraints, they are unlikely to stir up more things to put on the "to do" list. If the center does not present compelling requirements (formally or informally) and a business case, IT is unlikely to make some exciting new contact center technology a priority.

Further to IT's defense, they may feel they have informed the center of what's possible as they've talked about upgrades, vendor meetings, etc. Whether formal or informal, if they are communicating with the center, they can easily feel everyone is up to speed. A key factor is whether the meetings are at an executive level or at the "in the trenches" level. Communication issues can be up and down the chain on either side, or across the aisle at either level.

With no ill intent whatsoever, IT is doing their job and may be unaware of contact center gaps or concerns. In an effort to show they are ready, willing and able to help, they often say something like, "Just tell me what you want to do…" with the promise that they will then consider it. Unfortunately, in some environments this offer can backfire as it frustrates the center because they are stuck at "Tell us what's possible." The "Chicken and Egg" dilemma is in full swing (see Figure 1).

Realities That Compound the Issues

If these communication disconnects are not enough, a few factors can compound the issues. Current vendor availability for discussions—to whom, how often, with what kind of resources—is one example. Is a sales person pitching the next great thing, or a technical expert solving issues with a leap forward in technology? Is it someone who really understands the business or just a talking head brought in for generic marketing pitches? Is the vendor meeting with the "buyer" or with "the user" of the technology—or both?

At the same time, new vendors may be making inroads in the center or IT to position their products and solutions, targeting business needs or superior architecture and manageability. They can unknowingly and unintentionally create disconnects and divergent views across the organization.

Resource allocation is an internal issue. Who controls budget dollars? Is it IT or the center, or IT based on contact center priorities? Who has project resources to pursue the priorities: IT or the center or a Program Management Office or…? Of course, most companies also face resource constraints, with not enough budget to go around, and too many priorities competing for too few resources. They may also be struggling to address executive edicts to accomplish business goals within a target timeframe without the resources to pull it off. That makes the planning and alignment between IT and the center even harder, and can quickly divert precious resources.

Solving the Dilemma

The good news is that in the midst of all these challenges, both sides are sincere and want to end up in a good place. They just get stuck with this chicken-and-egg dilemma and the compounding issues. Which comes first—the requirements or knowing what's possible? These things have to happen in concert and through iterations. And the two groups need to work together to deal with the realities of the environment.

One approach to solve the dilemma is to trigger the appropriate communication and collaboration when needed. This approach is often the default, given how busy everyone seems to be these days. Budget season is a good example. People get together and talk about what is needed when the budget deadlines loom. The challenge with this approach is people are often behind schedule, short on resources, rushed, and unable to properly discuss and sort it all out. And, of course, without ample time, they still face the chicken-and-egg dilemma.

A better approach is to form habits, a routine that ensures timely, ongoing collaboration and communication. Companies that put processes, resources, and reinforcement mechanisms in place are the ones that have the best use of technology, the greatest "bang for their buck," and the best results in meeting the efficiency and effectiveness goals for IT and the center. Those that do it right use structured governance and clearly defined and understood processes for technology planning and pursuit, with both IT and the contact center as active participants. They leverage PMO or other groups as appropriate. They have routine, proactive communication and collaboration, not just reactive, budget-driven exercises.

One key to success is defining who will trigger the routines. Responsible parties ensure that IT and the center build strategic plans together and review and adjust routinely (for example, biannually). They help each to look at the next one to two years at a minimum, perhaps looking out three to five years in environments where that makes sense. And they ensure that all are equipped to address the daily business needs and hot buttons that crop up in every center.

The sidebar provides a list of top ideas we've seen put into action. We hope you can adopt some of these ideas, or fine-tune the approach you use to optimize your contact center technology planning and execution.

Hatch Something Exciting

Remember, both IT and the contact center have hard-working, competent, well-intentioned people who most often have a common goal to deliver great service and sales. They may not, however, always have the same priorities and urgencies. Putting some of the ideas discussed here in place will make great strides to avoiding the dilemma and making everyone feel like there are, in fact, easy ways to make things better. For most companies, a critical success factor will be applying some change management to make sure these ideas "stick" and form new habits that lead to positive progress in contact center technology pursuit.

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TOP IDEAS FOR IT AND CENTER ALIGNMENT

by Lori Bocklund

Here are the top ideas for ensuring that your contact center and IT see eye to eye:

1. Establish and reinforce a cultural model where IT sees the center as its “customer.” In the best incarnation, IT adopts a mindset focused on how to help the center succeed in achieving its goals.

2. Adopt an IT-enabled business strategy in which IT strategy aligns with and supports the contact center strategy, while both align with and support the overall enterprise business strategy (mission, vision, objectives, market strategy, differentiators, etc.).

3. Develop a liaison position with a key responsibility to keep the business informed on what is possible with contact center technology and IT informed on the contact center’s business needs. This position is most often found in the center, but it can also work when placed in IT with the right role and responsibilities. Some (typically bigger companies) even put a resource in place on each side with the task to work together to bring their respective departments in alignment in planning and execution. Regardless, they must have a working knowledge of contact handling processes and systems and a direct connection to the vendors.

4. Ensure that support resources are assigned, with roles and responsibilities defined. For example, application of tools for menus and prompting, routing, workflows and performance management need trained and knowledgeable staff to drive business value. These people should intimately know the technology and understand how it is—or needs to be—used in the center.

5. Set up routine but targeted update meetings with key vendors at least quarterly. Whoever “owns” the vendor relationship schedules them, but anyone can submit topic ideas. Give the vendor a clear agenda prior to the meeting so they come prepared to discuss specific capabilities and solutions.

6. Similarly, schedule knowledge exchange sessions. IT helps the center understand the technology and possibilities, and the center helps IT understand the people and processes for contact handling. Understanding is the beginning of a true partnership. Knowledge exchange sessions can include shadowing for IT to watch reps handle contacts, and internal “site visits” for the center leadership to see technology areas such as data centers, test labs, and help desks or network operations centers (NOCs).

7. Use a governance committee for contact center technology planning that includes IT and contact center leaders. This committee is responsible for approving investments, managing risks, and allocating resources to the right projects. Tie governance in with the Program Management Office (PMO) or other centralized project management functions.

8. Establish service level agreements between the contact center and IT that address not only troubleshooting and issue resolution, but day-to-day changes and project needs. Then make sure the SLAs are used, monitored and reinforced.

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