PUTTING RESOURCES TO WORK SO YOUR TECHNOLOGY DOES, TOO!

Don't blame technology: The right people on the right tasks can make the difference.

By Lori Bocklund, Strategic Contact

Contact Center
pipeline

Pipeline Articles
www.contactcenterpipeline.com

Lori Bocklund
Strategic Contact

TECHNOLOGY IS SO EASY TO BLAME. For what? For not meeting metrics, keeping costs under control, delivering great service, driving enough revenue? The list goes on. Center leadership, staff and support team members often exclaim, "If we only had…!" as they point at technology as the culprit. They don't have what they need, don't have the right vendor, or the darn things they do have just don't work right. What is going on? After 40 years of contact center technology, is it really that bad? I think not.

I think the right resources can help you to travel a better path. Too often people focus on the technology alone, whether applications and functionality from the business side, or hardware and software from the IT side. They feel disappointed and frustrated when solutions don't live up to expectations. To drive value from the technology, look at the full lifecycle from planning to implementation to support. Define—and fund—the resources you need to get it right each step along the way. We'll look at both internal and external resources to accompany you on your journey.

To set the stage, think about the wide range of roles that will make your projects and technology a success. Start by assessing where your internal resources can meet demands, with well defined roles, responsibilities and accountabilities. Define measurable results that go beyond checking off project tasks or attending system "cut over." Then think about where you need help from external resources (aka "professional services") for bandwidth and/or expertise. Define their scope and measures of success with good acceptance criteria, SOWs, SLAs, etc. We'll talk about each of these more later, but let's start with the steps on the lifecycle they may support.
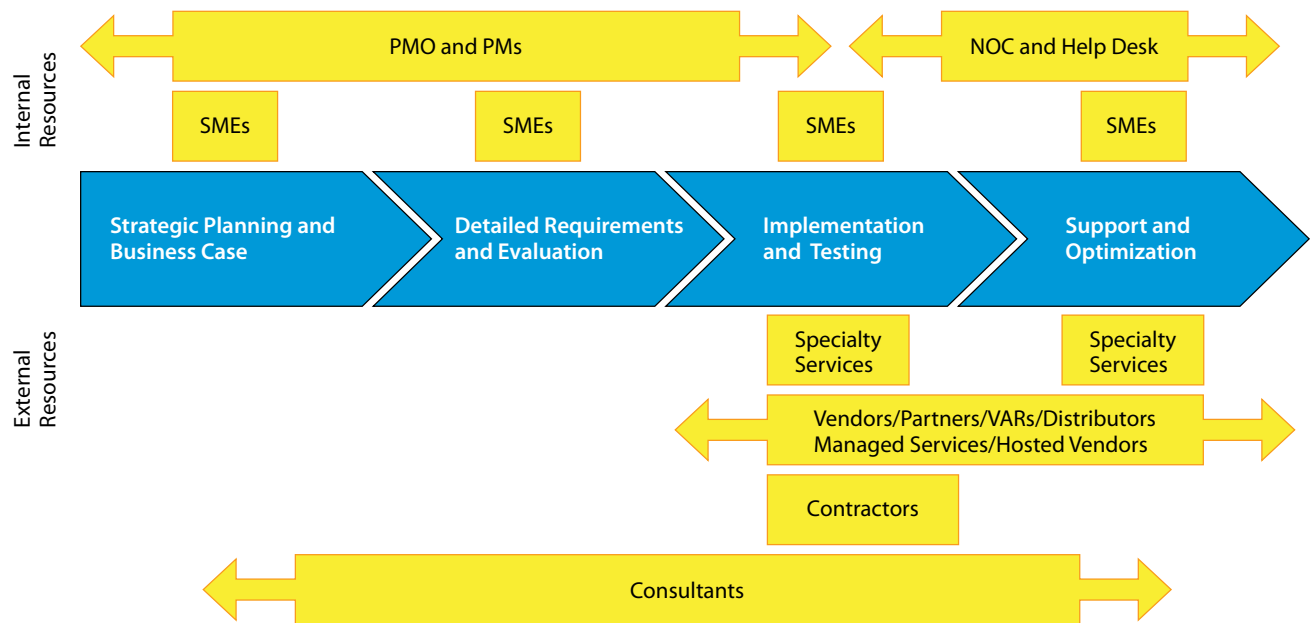
The Technology Lifecycle

Strategy and planning give rise to projects: defining *what* you need to do based on high-level business requirements, as well as when and why. They provide clarity on phasing and interdependencies, with proper consideration of other initiatives, resource and budget constraints. Part of the early stage is building a **business case** or developing a Return on Investment (ROI) analysis. Not an easy task or one that most people tackle routinely, but critical for gaining approval in most environments.

With approval secured, you can progress to more **detailed requirements**, addressing functions, architecture and more. Feed them into an RFP and work an **evaluation** process to select the best solution to meet the defined needs. This step ought not to be compromised: investing the time and resources up front can pay off down the road.

Next comes **implementation** with the goal to cut over by a target date but also to drive business value. Project Management, Change Management (see sidebar), and Subject Matter Expertise or Specialty Services on both the business and technology sides can come into play to get through this intensive stage of design, development and **testing**.

Just when you think you've reached your destination, it becomes clear there is more road ahead. **Support** may invoke thoughts of "maintenance" but bears more weight when considering how to ensure that the system delivers as promised, and how to keep the system functioning well and meeting the business and technology needs. The basics include break/fix and troubleshooting, Moves/Adds/Changes (MACs) or other day-to-day changes (business or technology driven). It can be especially pertinent in a dynamic environment with configuration changes impacting things like routing or reporting. Advanced environments consider **testing and monitoring** to address performance, stability and unique operational needs. Finally, a critical part of the lifecycle is the **ongoing optimization** in applying the technology. The post-cutover stage is ripe with opportunities, challenges and, unfortunately, surprises.

```
                  ┌──────────────────────────────────┐    ┌──────────────────────┐
                  │           PMO and PMs            │    │    NOC and Help Desk │
                  └──────────────────────────────────┘    └──────────────────────┘

          ┌────────┐          ┌────────┐      ┌────────┐      ┌────────┐
          │  SMEs  │          │  SMEs  │      │  SMEs  │      │  SMEs  │
          └────────┘          └────────┘      └────────┘      └────────┘
```

| Strategic Planning and Business Case | Detailed Requirements and Evaluation | Implementation and Testing | Support and Optimization |

```
                                            ┌──────────┐      ┌──────────┐
                                            │ Specialty│      │ Specialty│
                                            │ Services │      │ Services │
                                            └──────────┘      └──────────┘

                              ┌──────────────────────────────────────────┐
                              │  Vendors/Partners/VARs/Distributors        │
                              │  Managed Services/Hosted Vendors           │
                              └──────────────────────────────────────────┘

                                       ┌──────────────┐
                                       │ Contractors  │
                                       └──────────────┘

            ┌────────────────────────────────────────────────────────────┐
            │                        Consultants                          │
            └────────────────────────────────────────────────────────────┘
```

Mapping Internal and External Resources to the Technology Lifecycle, **Figure 1,** *above*

Internal Resources

The first place to look for help on your journey is your internal resources. Each offers different contributions. Understand the resources, their bandwidth and expertise, and their strengths to fit them into the right steps on the lifecycle.

Many companies, especially larger ones, have a **Program Management Office** (PMO). The PMO aids in prioritizing projects and resources and is most often used for large-scale projects or projects with interdependencies. The PMO helps bring silos together to see the bigger picture. PMO engagement typically lasts through implementation, not support. However, a well defined PMO will follow through to track results against business case expectations, and with the proper structure and governance, can be a key to success.

Project Management (PM) teams—whether within a PMO or not—tend to have similar considerations for scope of role, follow through, etc. IT may have PMs. You'll want to review their role, focus and expertise: How much do they dive into business needs? Understand contact center technology specifics? When do they get involved? How long do they stay involved? Business PMs need a similar assessment: How well do they understand the technology? Do they partner with IT? Do their responsibilities start with planning or requirements and extend through optimization? If you have the luxury of having both IT and business PMs, hopefully, they work as a team with defined boundaries, roles and collaboration. Define the best fit for the specific project needs, because all projects are not created equal! Key factors include the level of impact on "users" (whether agents, supervisors or customers) and how much process or organizational change needs to occur with the technology.

IT and business areas also ante up project resources that bring particular knowledge, experience and focus. These are your **Subject-Matter Experts** or "SMEs." Ideally, projects will have a crossfunctional team with resources to focus on the effort end to end. A caution is in

order, however: It is hard to do one's "day job" and support critical contact center technology projects effectively. Compounding the problem, the best SMEs are generally also in the highest demand. So define the stages of the project where more time is needed and engage SMEs at these times. For example, business SMEs are crucial to requirements and design specifications for input, review and approval of functional design. They generally lead user testing. IT SMEs must help evaluate technical fit of architecture or other hot-button issues. They must weigh in on the technical design specifications and participate in performance testing.

Your **Network Operation Center** (NOC) and **Help Desk** are the final internal resources to consider. They play a critical role so you must define the expectations for reactive or engaged support. Their role may include root-cause analysis and proactive changes to ensure stability and performance. If you want to dive into all aspects of technology management and support, read Our Tech Line column, "Keys to Success in Supporting Today's Contact Center Technology," *Pipeline*, January 2011.

External Resources (or Professional Services)

When gaps are evident—whether because of bandwidth, experience, expertise or fit—it's time to consider external resource options—aka "professional services." The right ones will depend on your project scope and the gaps you identify.

Vendors provide products but may also provide services to implement and support solutions. Or, they may rely on **Partners**, which some refer to as **Distributors or Value Added Resellers (VARs)**. Whoever is selling typically delivers more than just the hardware and software; they play a key role in professional services—whether their own, sub-contractors or some combination. Make sure you understand the offerings and where the professional services you are buying come from and where the control and allegiance lies. Who is bringing the specialized knowledge your implementation demands? And who is delivering the tiers of support for the front line and escalation when something is amiss? Understand the impact on project timelines, support response times, resource accessibility and more.

Contractors are often used during implementations as a sort of specialized "Temp." They typically have a narrow focus on the project team and a specific role that addresses a unique need or staffing gap. They are often contracted through larger services companies that field requests and find the right experience from their bench of employees and/or sub-contractors. You want to have a say in the approval of the *individuals* you will get, even if they are from a trusted company. The match of their experience, expertise and cultural fit are nearly as important as they are for a full-time permanent employee hire.

Consultants (and disclaimer here—I am one!) fill a specialized role on projects, often leading or contributing to specific tasks or tracks within a project. They can bring a strategic, holistic, comprehensive view with the expertise and experience you need in high-risk or sensitive areas of the project. You'll want to choose the *company* wisely, with a focus on their fit for the role you need them to play and the value they deliver.

Specialty service providers are a bit of a hybrid, neither vendor or consultant. They fill niches like monitoring and testing, using specialized tools and expertise.

With today's sourcing alternatives, additional service options include **Managed Services** and **Hosted** solutions. In these cases, the vendor resources manage the technology. Both can impact implementation, but are particularly critical for ongoing support. These models require careful task and cost management but are a great fit for those with IT resource constraints.

Some Project Hot Spots

Having been involved in countless projects, I've seen successful use of external resources, as well as the pains and problems from a lack of the right people on the right tasks. Here are some specific examples of strong needs for professional services from outside with an independent view and some targeted expertise, tools and resources:

BUILDING A BUSINESS CASE

Internally, it is often difficult to know what's possible and to see the other things that have to change (processes, roles) with the technology. Vendors may offer help, such as an ROI calculator, but these can be tainted by their bias, preconceived outcomes or more impact than is due to a given technology. Independent resources bring insight and experience with no hidden agenda.

REQUIREMENTS AND EVALUATION

I've heard "We don't know what we don't know" countless times. You don't evaluate solutions every day, so turn to those that do and start with business needs rather than vendor product-driven requirements.

DESIGN

Vendors often want to implement their new solutions into "as is" operations. Internal resources don't know what to ask for or what's possible, and may not be change oriented. The more specialized the task (e.g., IVR design, knowledge structure), the more likely you need help.

TESTING SERVICES

Usability testing from experts that do it routinely or load testing that can really put a new system through its paces can be invaluable in driving a positive outcome for your project.

MONITORING SERVICES

The complement to testing that comes into play post implementation is monitoring. Services with specialized tools and dedicated eyes on glass and/or alerting ensure timely, proactive and preemptive response. That beats the typical scenario of reactionary scrambling to understand what happened, why, how to fix it and how to prevent it again (without any real data) any day.

OPTIMIZATION

You don't know what you're missing if you don't routinely seek optimization (e.g., quarterly, biannually, yearly) for continuous improvement. Without resources focused on this task, nothing improves, and the blame game starts. Users don't know what to ask or look for and think new technology is the answer. Expert resources to help you do more with what you have will also help you break the cycle of buying new stuff without commensurate benefits.

Don't Blame Technology

It's not all about the technology, it's about how you drive value from it. Using resources wisely will help your next project to succeed. You need enough time from the right people with the appropriate knowledge and experience. Determine the best fit, considering both internal and external resources, to help optimize technology for your center across all stages of the technology lifecycle. ⓟ

Lori Bocklund is Founder and President of Strategic Contact.

✉ lori@strategiccontact.com
☎ (503) 579-8560

CHANGE MANAGEMENT RESOURCES

One of your most critical resources for getting value from your technology is the Change Management team. These people don't focus on version upgrades (that's "IT Change Management"). We're talking about people change here. People adopt technology well and continue to use it effectively if you help them understand why the change, what it will do for them, your company and your customers, and how to use it right... with ongoing reinforcement. Internal Change Management resources may be in HR or the PMO, for example. If you need to look externally for assistance, check out consultants who have that focus or provide it as part of their practice. Make sure you apply Change Management to both the frontline users of technology, like agents and supervisors, and the key support roles, such as IT or analysts. Their roles change along with new contact center technology.

. . . .

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.

To learn more, visit: www.contactcenterpipeline.com

Online Resource

This issue is available online at: ContactCenterPipeline.com
http://www.contactcenterpipeline.com/CcpViewIndex.aspx?PubType=2