Tech Line

Let's Get Small
(or Medium)

By Lori Bocklund, Strategic Contact

There has never been a better time for small to medium centers to get the technology that they need.

It may have appeared that Randy Newman attacked the self esteem of every person of lesser stature (including myself) with his 1977 song about short people, but no one would dare to pen a hit against small to medium contact centers (SMCCs). Today's market respects smaller centers by offering them advanced contact center functionality without an undue burden on their IT and support staff. Whether a center is part of a small business, or just a relatively small center in a large business, it's time to take things up a notch because technology makes great things possible.

Defining the SMCC

The industry has no strict definition of what constitutes various sizes of centers. For this article, I'm defining small as 50 seats or less, and medium as 51 to 150. That covers a lot of centers. Within that range, characteristics can vary, but these centers generally share common traits:

- One or few locations

- Basic technology with strong desire for

more capability (thinking big centers have all the goodies!)

- Constrained staffing levels for front line and support, with support people, supervisors and/or managers playing multiple roles

- Incredibly resourceful with good people using manual workarounds that aren't scalable, consistent, reliable, efficient or wholly effective

- Pressure to get big bang for the buck with their limited technology budget

Centers differ in their maturity, in-house technical expertise and experience, risk tolerance and financial resources (see Figure 1). All those factors help define who they are and what they can—or can't—do with contact center technology improvements.

Sourcing Alternatives
Create Possibilities

Limited resources make it neces- → *page 2*

sary for SMCCs to be creative in their approach to technology sourcing. There are plenty of alternatives to consider—managed services, hosted solutions, technology suites and boutique vendors. This range of options accommodates differences in funding and support resources while making it easier and faster to procure and implement robust functionality.

Both managed services and hosted solutions enable companies to "rent" technology from service providers who grant access to their applicable hardware and software "in the cloud." A hosted solutions provider makes the application available and leaves the day-to-day administration in the company's hands. In a managed service relationship, the provider absorbs the majority of the ongoing applications management and administration functions, thereby further relieving the burden on IT resources. Both options minimize capital investment and limit dependence on IT. Hosted solutions can work in concert with enterprise premise-based solutions where needed.

Suites for core contact center technology—whether hosted or premise-based—can deliver great "bang for the buck." Some combinations address the core capabilities including ACD, IVR, CTI and multimedia contact management. Performance tool suites offer WFM and QM as well as eLearning, voice of the customer, analytics and scorecard tools. The architecture of these solutions and the structure of the licensing deliver advanced capabilities without an eye-popping upfront investment or staggering incremental cost for adding capabilities.

SMCCs should also consider reputable vendors that are "second tier" in market share but top tier in functionality. Their licensing fees tend to offer lower price points, and they generally have the freedom to deliver more attentive service than the big players. It's an especially attractive option for centers that already have a stable infrastructure and simply need to add an application. The lesser-known players are generally good integrators with all the "name" brands, which they encounter frequently.

Technology Directions Enable SMCCs

It's not solely the approach to technology delivery that enhances the SMCC opportunity. Market directions position technology to better support the smaller center. Voice over Internet Protocol (VoIP) has become ubiquitous, delivering solutions that serve many sites with a single platform. The location of the center relative to headquarters or the data center is moot, and the center doesn't need its own platform. Rather, it can leverage the enterprise solution for core voice communications and/or for contact center applications where appropriate. Moreover, VoIP—whether hosted or premise based—offers the opportunity to manage peaks and valleys in staff requirements. Home agents, staff at other corporate locations and/or "on-call" agents can bolster the center's workforce during peak periods. VoIP creates staffing flexibility and agility, leveraging all the functionality available.

Today's contact center technology also uses standards like Session Initiation Protocol (SIP) and Voice eXtensible Markup Language (VXML). These options can drive down costs and open product and service opportunities. For example, a center using SIP trunking optimizes their flexibility for peak traffic handling. VXML lets centers with limited resources tap a broader pool of people to develop, manage and maintain voice applications. Both of these technologies provide smaller centers with increased agility while
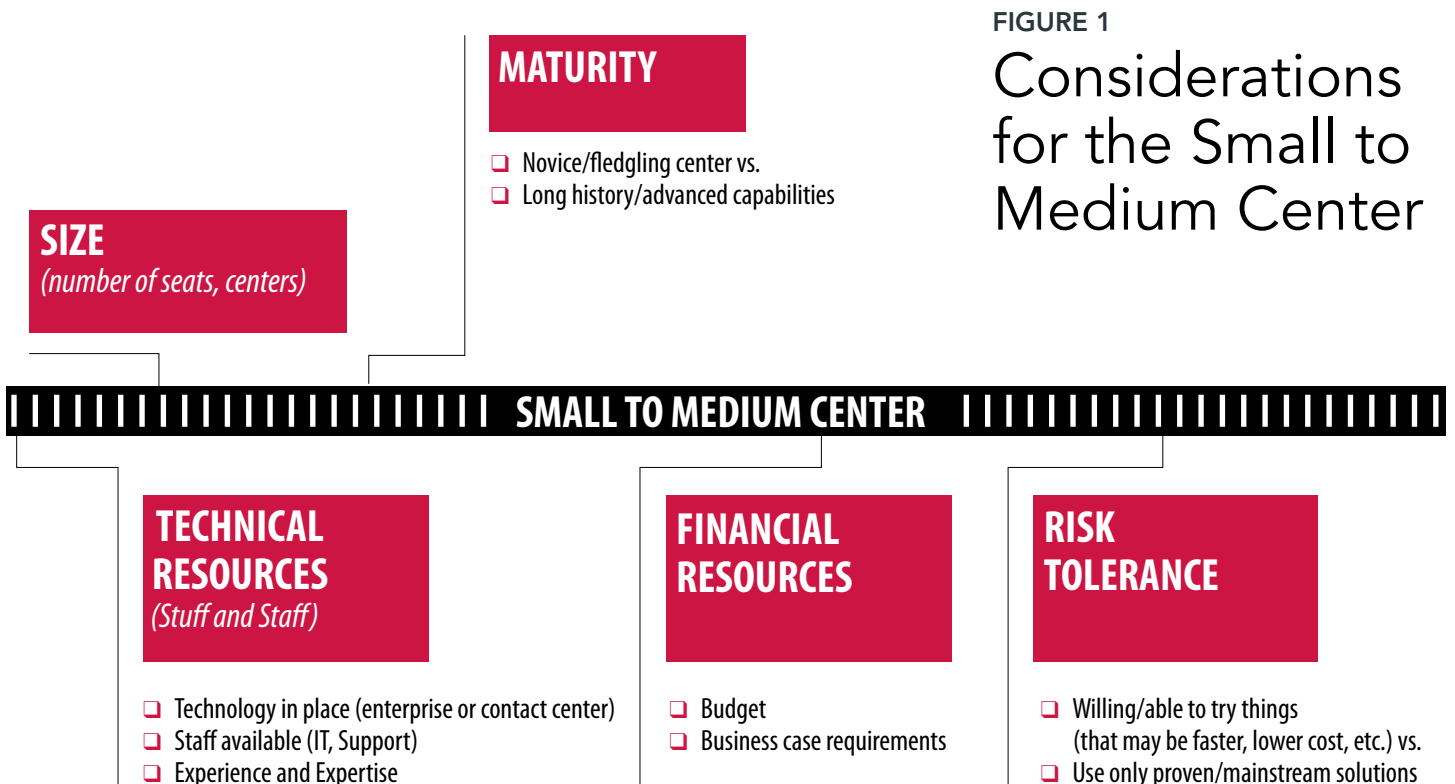
FIGURE 1

Considerations for the Small to Medium Center

MATURITY
- ❏ Novice/fledgling center vs.
- ❏ Long history/advanced capabilities

SIZE *(number of seats, centers)*

SMALL TO MEDIUM CENTER

TECHNICAL RESOURCES *(Stuff and Staff)*
- ❏ Technology in place (enterprise or contact center)
- ❏ Staff available (IT, Support)
- ❏ Experience and Expertise

FINANCIAL RESOURCES
- ❏ Budget
- ❏ Business case requirements

RISK TOLERANCE
- ❏ Willing/able to try things (that may be faster, lower cost, etc.) vs.
- ❏ Use only proven/mainstream solutions

reducing their reliance on limited IT resources.

Requirements Help Identify Priorities

When SMCCs look at their technology needs, they must determine what business problems they are trying to solve and what technology they truly need. Few centers can "have it all." So a careful assessment of what they have and what they need, driven by business requirements, is in order. That's where the all important tradeoffs begin to occur, identifying where they must make targeted investments and where they might need to compromise with a lower cost approach to get the most for their money.

Every center needs certain things—like ACD functionality. Most SMCCs also need a robust set of performance tools to meet their goals. In some cases, self service through IVR is compelling and justifies putting it high on the list; in other cases, it may not be worth the trouble. For more complex technology such as CTI, CRM, KM, eLearning, and analytics or business intelligence, the company must have enough critical mass to justify the overall costs of integration, implementation and management, and also be willing to invest in the resources to apply the technology effectively.

The good news is that there are ample lower cost alternatives to explore for some capabilities. For example, SurveyMonkey can substitute for a full voice of the customer solution. Centers of all sizes find things like SharePoint 2010 and its wiki functionality to be faster to implement and far lower cost than a full-blown knowledge management system. Basic Erlang calculators serve WFM needs for hundreds or a few thousand dollars (versus tens of thousands of dollars or more for a full WFM system), while PC-based recorders deliver basic call recording for quality monitoring.

Many other technologies are well suited to SMCCs. Desktop wallboard software can deliver statistics and messages to each agent. Presence and instant messaging through the corporate tool (e.g., Communicator) deliver access to peers and subject-matter experts. Mobility lets agents and supervisors, as well as on-demand staff, work from a variety of locations, including home. Good old-fashioned skills routing, applied effectively, can enhance what the SMCC does with its skilled resources rather than further compromise economies of scale. And I hate to say it, but even reporting tools such as Excel, Access and Crystal can go a long way to boost SMCC abilities.

Finding the Value in SMCC Technology

Just like large centers, SMCCs need to be able to justify the technology purchases they seek. They need to start with an assessment of their current environment. Most contact center technology is highly underutilized, so chances are that they can drive more value out of what they already have. This assessment should include a full survey of centers and technology around the enterprise. There may be synergies across multiple groups, and it will bolster an individual business case to have more groups involved. Various groups can all leverage the same platform and applications, and potentially shared services for support.

Vendors or their distributors are important

SMCC Vendors

As you look at technology options, make sure you consider all the possibilities, including:

- **Big enterprise/ contact center vendors.** Major vendors (such as Avaya, Cisco, Genesys) offer "express" or otherwise labeled solutions targeted at the SMCC.

- **Second tier (market share) vendors.** They don't have to dominate the market to be a good fit for the SMCC. Smaller players can often deliver bigger service.

- **Distributors with a focus on SMCCs.** The distributor can be as important as the technology, especially when they focus on smaller centers. They may also offer "bundles" of contact center technology from a variety of vendors or their own products to provide advanced functionality at a lower price point.

- **Hosted solution vendors.** Many of these companies target the SMCC because they know their solutions will resonate for those trying to go far, fast, and with less demand on internal resources and budgets. Most offer pay-as-you-go plans.

Strategic Contact offers resource and vendor lists on its website: **http://www.strategiccontact.com/lists.asp** Use these lists to find the vendors that offer the solutions you need.

resources to leverage. If they haven't been around lately, SMCCs should see if they can provide "check-ups" to find ways to apply what they already have. They may offer attractive add-ons to existing implementations or valuable capabilities through their partners. Vendors can also help with the internal sales process, including building a business case.

Finally, it's time to be flexible, creative and bold. The market has different opportunities that may be a great fit for a center's distinct situation. Sometimes those options require a small loss in control or other concession. IT and contact center operations should work together to brainstorm and assess possibilities using a structured planning effort, with discovery internally and across the market. Networking with other SMCCs can be an invaluable investment of time. The user community is a great resource for learning what does and doesn't work, and finding innovative approaches to cost-effectively deliver the functionality SMCCs need.

Don't Just Do It, Do It Right

Three cautions are in order to position SMCCs to "get it right" as they pursue new contact center technology. One is tied to the dearth of technology they've had and the desire to bite off more than they might be able to chew—or fund. The second is about taking the time to properly evaluate and choose solutions and vendors. And the third is a drum we've beat before and will beat again—people, process

and technology work together for success.

Many SMCCs will approach the planning for new contact center technology from a "technology-starved" mindset. That's all the more reason to take a deep breath and invest the time to understand the business goals and gaps, and focus on requirements to prioritize. No one can or should do it all at once. We recommend building a technology strategy using a phased approach, based on those requirements gathered from SMCCs across the enterprise.

SMCCs need to apply the time and requisite due diligence to find the right solutions and vendors for their circumstances (not necessarily RFPs, but a requirements and evaluation process at a minimum). All too often, we see companies make bad choices because a lone individual pushed something through based on personal preference, experience or referral, or because the center's management thought they didn't need the good stuff and would make do "on the cheap." The lack of investment in the right technology is quickly offset by investments in labor and/or subpar performance.

While all this news about SMCC opportunity is exciting, we must keep in mind that it's not all about the technology. People are the key to getting the value out of technology, no matter what size the center. That means frontline staff, as well as support staff, have to engage to drive value and effectively implement, manage and apply these technologies. In any technology pursuit, the roles and responsibilities of IT and

the contact center operations support functions need to be clear. More and more, companies are driving responsibilities for technology application into the business. The SMCC is poised to take advantage of that trend so long as they can ante up the people. Process changes go hand-in-hand with these resources commitments to use technology in new and different ways and drive the value desired and the outcomes needed from solutions for the SMCC.

You're Fun Sized!

Remember, Randy Newman wasn't really bashing short people. In fact, one line of the lyrics says, "Short people are just the same as you and I." SMCCs aren't that different from the big centers, and today's technology lets them joyfully celebrate their size while delivering robust capabilities that serve their customers and their companies well. SMCCs have many advantages over large centers in areas such as culture, manageability, and teamwork. If you are an SMCC, don't feel defeated because you're not so big. Go out and seek some new technology improvements, and use my favorite line: "I'm not small, I'm fun-sized!" ⓟ

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