

The Value of Technology Assessment and Planning

A four-step process to ensure that you're pursuing the right technology to meet your requirements and environment.

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We get the sense that the pursuit of technology projects is on the rise. Before anyone gets too excited though, let's acknowledge that starting from the position of pent-up demand and "end-of-life" threats on existing systems is not optimal for making careful and thoughtful decisions. Moving too fast can lead to "shelf-ware" and unrealized expectations—scenarios most centers have experienced far too often. A structured process will reduce risks and enable you to achieve your goals, without needlessly hindering your quest.



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Good Beats Fast

Many centers have squeezed as much time as possible out of their technology. Whether due to a better economic outlook or just a sense of "we have survived the worst of it" (or the realization that we can no longer afford to sit still!), capital budgets seem to be loosening. Even when there were funds available, it was hard to justify moving the contact center technology to the top of the priority list as it "just keeps working." But now, for those under a threat of limited or no support, the clock is ticking. Worse yet, some centers are finding themselves with unstable systems where the alarms have already gone off.

Demand to meet new business requirements is also on the rise. Complexity, agility, growth and competitiveness all create pressure. In response, vendors tout more advanced features/functions that contact centers of all shapes and sizes want—and many probably need. But there are so many choices and the wish lists are too long, with not enough time, money or other resources to pursue them all.

Adding to the situation, contact centers typically depend on IT to drive technology projects. However, IT is resource constrained and can't get to all the priorities. Now there are new and better ways for centers to get where they need to go. Sourcing options like the "cloud" open up new possibilities with less demand on IT.

While it is tempting to jump to the "answer" and get moving, you need to make sure you pursue the *right* technology to solve the *right* problems, the *right* way. A technology assessment and planning process will ensure that you define your requirements, assess the ability of current technology to meet your requirements, develop a roadmap to fill the gaps and implement in a way that drives business value. And chances are you'll get to the *right* place, at the *right* time.

The Assessment and Planning Process

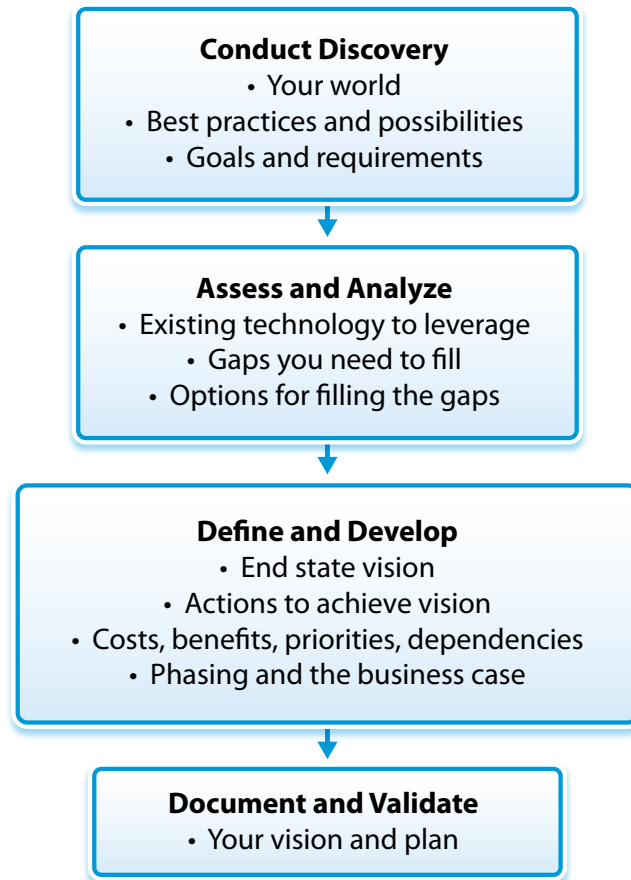
A formal assessment and planning process pursues the appropriate technology to fill your requirement gaps without buying more (or less!) than you need. It secures solutions that fit into your overall technology environment while delivering business value. Figure 1 shows the steps to follow.

CONDUCT DISCOVERY

Conducting a discovery process helps your team understand your center and its business and technology situation as well as the external world and what it has to offer. Start by developing a thorough understanding of your current technology environment. Begin with foundational components such as your enterprise telephony and the voice and data networks. Block diagrams are very useful to get everyone on the same page. Then list all the contact center applications, remembering it isn't enough to just know what you have. You need to understand all of the integrations between applications and how the foundational elements link applications, locations, etc. The sidebar ("Contact Center Technology Categories") can

Technology Assessment and Planning Process Flow

Figure 1, right



help ensure that you consider all pertinent technology.

Once you understand your current environment, envision the possibilities by getting a deeper knowledge of the industry, the contact center marketplace, your competition, and industry leaders. Understanding your current technology and the potential should yield answers to the following questions:

- What else can your current technology do?
- What are other contact centers doing—preferably the “best” centers?
- What do vendors say their technology can do for a center of your size and budget?

Ensuring that you have enough knowledge to make the right decisions is a tall order. You don’t have to feel alone. The sidebar (“Sources of Help”) offers guidance for this important foundational step.

Now that you know where you are and where you could go, start narrowing the possibilities by defining your goals and requirements. Start with a focus on the overall strategic goals and define the requirements that will enable the contact center to support the business in achieving the goals.

ASSESS AND ANALYZE

You end the Discovery stage with information about where you are and where you could go, along with some defined requirements to guide your effort. You'll use the information and insights to conduct an assessment and analysis of your center's technology.

Take the list of current technology and go deeper to understand how the technology is applied today. This analysis should uncover ways that you could more effectively apply what you already have. Next, expand your requirements definition from the Discovery stage with more detail around the functional and technical requirements that enable you to meet business requirements. Identify the gaps to fill, the options to fill them, and the tradeoffs for each option, considering existing and new technology.

One of the most powerful ways to assess options is to define criteria that characterize tradeoffs. Your evaluation criteria go beyond standard features and functions, looking into issues of architecture or technology "fit," sourcing considerations, roles and responsibilities in design and implementation, roles and responsibilities in ongoing support, etc. The criteria turn the realities of your organization, existing environment, and approach to technology procurement and implementation into guideposts to developing your plans. Establishing criteria that are meaningful to your IT and the contact center allow you to prioritize options effectively based on your pain points and dependencies. High-level cost/benefit analysis at this stage also drives more credible prioritization.

Part of your analysis should also include other success factors for effective application, integration, procurement, implementation and support. Look at resource needs, support models and sourcing strategies, including vendors to consider. And make sure you consider financial, time and resource constraints.

The end state of the Assess and Analysis stage is an understanding of credible and prioritized options to fill your gaps with the pros and cons of each option.

Contact Center Technology Categories

The scope of a technology assessment and strategy can include many elements, such as:

- **Architecture**
- **Integration**
- **Sourcing**
- **Business continuity/resiliency and disaster recovery**
- **Voice switching—PBX/ACD, VoIP strategy**
- **Network services and features**
- **Routing—Multisite, multimedia**
 - Including remote sites, outsourcers, home agents
- **Outbound dialing**
- **Proactive contact**
- **Email, text chat, web collaboration tools**
- **Web self service integration**
- **IVR/ASR for routing and self service**
- **CTI, including IVR integration**
- **CRM, contact management, scripting, workflows**
- **KM, wikis**
- **Other business applications and their integration**
- **Integrated/Consolidated Desktop**
- **WFM**
- **QM/call recording**
- **Reporting/analytics/performance optimization tools**
- **Scorecards/Dashboards**
- **Analytics—speech, data, text, desktop**
- **eLearning**
- **Customer satisfaction surveys/Voice of the Customer**
- **Social media**

DEFINE AND DEVELOP

If you haven't already been working with a cross-functional team to complete Discovery and Analysis, form it now. The team should include IT and all workgroups that could use or benefit from the technology. They will review the analysis and develop the roadmap. It's decision time.

Start by defining the end state or vision. Make sure that you have synchronized your business, operations and technology strategies. The business and operations vision should drive the technology need. Develop a technology vision by discussing the options and tradeoffs and leveraging your criteria. Suggest technology models that may be appropriate and recognize the risks and how you will mitigate them. Define a vision for architecture, sourcing, infrastructure, applications, integration and support that will meet your goals.


Agree on the technology requirements to fill your technology gaps. Identify the specific changes to current technology or investments required. Prioritize the investments you need to make (money, time and people!) and define the new technology implications for your existing environment. Define the implementation approach including phases. Complete any financial analysis required for project approval. Define your next steps, which could include refining the list of possible vendors and their "fit" for your world.

DOCUMENT AND VALIDATE

Document all aspects of the plan, including the vision, required actions, budget submittal, and project phasing and timing. Capture sufficient detail for plan approval, but make sure that the whole team knows the "elevator story"—that is, the high-level messaging to capture the interest and attention of key executives. Schedule the meetings with the executive decision makers to gain buy-in. Be ready to iterate as required based on executive feedback. Project managers will create a more detailed version of the plan once the project has been approved. You'll want them to understand your vision and how to implement for business value.

More than Technology

When you've done all of your homework, you'll move toward your business goals by executing the plan. Pursue the specific technology you need to procure. Don't forget about a formal process at this important stage. Document detailed requirements, evaluate vendors and negotiate a vendor statement of work. (To read more about these processes, see "Optimizing Technology Selection," August 2011; and "Defining an Effective Statement of Work for Technology Implementation Success," September 2010, in the *Pipeline* archives.) Once you select a vendor, embark on a consultative, collaborative approach to design and other steps for implementation.

Remember that successful technology implementation requires a broader focus on process and organizational design. To achieve business value, consider how the technology change will drive changes in your metrics and support models. Technology only enables you to achieve your goals. Most likely, people will need to change their processes to use the new technology. The most successful projects that achieve their goals use formal change management to ensure that the people side of change is as successful as the technology change. By following formal processes from idea generation to goal measurement after implementation, you create an environment that breeds success. 

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Sources of Help

Don't feel like you can't take the time to plan technology effectively? Here are sources of information and insights.

- Vendors can provide a collaborative education forum for IT and the contact center. They can:
 - Educate on applying technology effectively
 - Evaluate current features/functions which might be underutilized
 - Define how future versions or upgrades to current technology can meet needs
 - Offer solutions to fill gaps
 - Meet frequently, routinely, with defined topics
 - Offer professional services for "optimization consulting"
- Contact center associations, conferences and publications are forums for industry/ market education, providing the opportunity to network with others through site visits and learning best practices (or what didn't work!).
- Consultants with proven processes and experience in assessing technology and developing strategy, vision, requirements, gaps and actionable technology roadmaps can support every stage of the process.

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.

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Online Resource

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