Tech Line

TOP TEN

TECHNOLOGY IMPLEMENTATION TIPS

Rolling out new technology in your center? Commit the proper resources and time during the implementation phase to ensure that your investment achieves the right results.

After a long and painstaking process to acquire the perfect technology, it's really tempting to just let the IT department get it up and running as quickly as possible. But speed cannot be your biggest driver. If you want to reap the rewards of all that hard work, you've got to take the time and commit the resources to "do it right."

Implementation is a crucial part of a larger project cycle that requires effective definition and planning from the start. This article focuses on implementation. Whether you are about to launch a project, are smack dab in the middle of one, or are open to fresh ideas for future projects, we guarantee at least one "lightbulb" moment somewhere among our top 10 tips. Read on!

Brian Hinton
Strategic Contact

Matt Morey
Strategic Contact

Steve Suhn
Strategic Contact

1. ESTABLISH A CROSS-FUNCTIONAL PROJECT TEAM

Implementing technology is no time for anyone to stand alone. A crossfunctional project team is critical to success. IT and Operations were likely instrumental in the selection process and will continue to be active team members, perhaps with expanded responsibilities. But you'll want to consider some other players for your implementation team:

- An internal Project Manager who is experienced with technology implementation and vendor management to coordinate with the vendor project manager

- Human Resources to be aware of changing roles and responsibilities or job descriptions

- Training to be aware of requirements and process changes and start developing content early

- Change Management to prepare the organization for what could be major change for people to absorb

- Procurement/Contracts to ensure that the statement of work (SOW) is complete

- Subject-Matter Experts (SMEs) from other areas of your organization to discuss business value opportunities and define requirements

While some of your team members may have limited involvement through the project, you'll still want to bring them together early to frame expectations for each person's contribution. Don't limit yourself by trying to define in advance how each person will add value. Offer a seat at the table to all affected departments. You need everyone's buy in and participation for success.

2. NEGOTIATE A COMPREHENSIVE VENDOR SOW

You can't cut to the implementation chase until you solidify the scope of professional services that the vendor will provide. The following are a few suggestions to guide that sometimes arduous process:

- Allow time for dialog when you define vendor and project team member roles and responsibilities. Clarity on who is doing what is critical, and it takes longer than you think to get it right!

- Ensure that the vendor includes its roles and responsibilities and yours in the SOW and specifies key points of contact to address issues as they arise.

- Define the process to request and approve changes to the SOW. (Yes, there will be changes! Don't stop the train while you figure out what to do.)

- Keep negotiating until you arrive at final pricing. Each iteration offers opportunities for vendor give-and-take.

3. DEFINE CLEAR OPERATIONAL REQUIREMENT

Start the design phase by clearly documenting operational requirements and goals for the new technology. Be specific about the efficiency, process or service improvements that you expect. Put the vendor on notice that you aren't recreating the status quo, nor are you opening the door to needless "scope creep." Take time to explore the capabilities, functions and options of the new system prior to design sessions with the vendor. Then, clearly document your new processes for "Phase 1." If you will have future enhancements to further leverage the technology, create a roadmap for subsequent improvement phases. These steps will ensure that you manage the scope on your initial implementation while also defining the next steps to further gain business value from your investment.

Communicate openly with the vendor's team on the short- and long-term possibilities and plans. Uninformed decisions in the requirements phase can cost you time and money down the road.

4. USE A "CONSULTATIVE" DESIGN APPROACH WITH THOROUGH REVIEWS

When the entire project team has a clear understanding of the requirements for the new technology, you are ready to engage in system design. Thorough team discussions and "face

time" with your vendor are crucial to achieving project goals — especially when the vendor supplies a different group of people for implementation than they did for bidding. Review the goals, expectations and requirements that you set during the sales process with all parties.

Vendors may try to rush the design process. They may promise a consultative approach to design but deliver a team that does not understand what you expect from them nor desire to take the time to dive in to your business needs. Take control of the process! Get the designers on site to work with you interactively. Encourage the team to discuss options and possibilities. Don't let the vendor be the sole decision maker on function and design. Without your input, it's all too easy to simply replicate your current environment or, worse, implement a "one-size-fits-all" generic design.

Never assume that the vendor "gets it." Review and document all decisions. Make sure the vendor's formal design document describes *exactly* what the team wants before you sign off on it. It's the blueprint for the solution they'll deliver. If it takes a few iterations to get it right, so be it. You're the ones who'll live with the outcome.
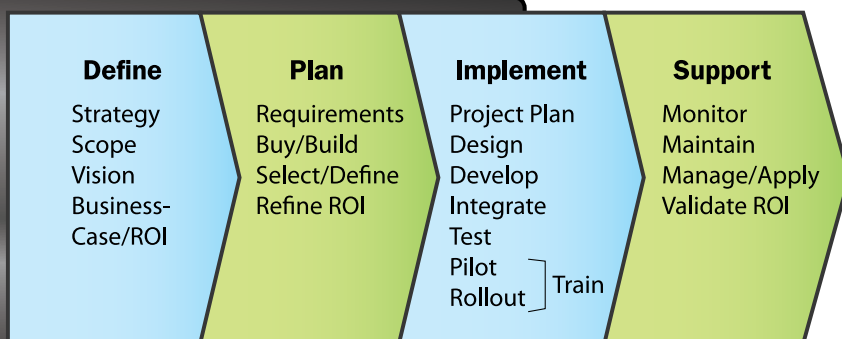
5. PREPARE YOUR FACILITIES AND INFRASTRUCTURE

Implementing new technology is not just about the software. Hardware and infrastructure play a critical role. Involve those responsible for these elements early to ensure that you meet project timelines. Work with your vendor to define and plan for all hardware requirements, who will provide it and when it will arrive. Delivery dates will drive your timeline for set up.

Most companies think their infrastructure is ready. You'd be surprised how much work needs to be done once you understand all the requirements and perform assessments. You'll need to assess your data and telephony networks *all the way to the desktop* to determine whether you need to extend or upgrade this infrastructure. Facilities will need to determine if you've got adequate power, space and HVAC to support the new hardware. They'll prepare the server room(s) and ensure that racks and power are available prior to installation. Remember, your infrastructure due date is much earlier than your

Figure 1: Implementation is one element of the Technology Project Life Cycle

Define	**Plan**	**Implement**	**Support**
Strategy	Requirements	Project Plan	Monitor
Scope	Buy/Build	Design	Maintain
Vision	Select/Define	Develop	Manage/Apply
Business-	Refine ROI	Integrate	Validate ROI
Case/ROI		Test	
		Pilot	
		Rollout ⎤ Train	

cutover date to enable development/configuration, integration, testing and training.

6. PLAN FOR AND SET UP A ROBUST TRAINING AND TESTING ENVIRONMENT

Don't underestimate the effort to plan for and set up your testing and training environments. It takes the entire project team — including your vendor — to ensure that you are ready. Plan on having detailed discussions regarding options and trade-offs. You'll want your testing and training environments to be as close to a production environment with live data as you can get. Ideally, your test environment will deliver calls over the same voice lines and account information over the same data networks as your production environment. Having calls delivered to the testing and training environments outside of, but consistent with, production may involve your carrier. Build in sufficient time to provision lines and/or make changes to your dial plan.

Implementation teams often overlook training and testing licenses that are above and beyond your normal user licenses. By securing licenses for testing and training, you will avoid scrambling to reallocate user licenses downstream. You will also need to establish testing and training accounts and account data, with appropriate access to the accounts.

Finally, plan to set up these environments early to be ready for those important project plan steps of testing and training.

7. TRAIN BOTH USERS AND ADMINISTRATORS

Technology implementations usually involve process changes. You'll need to rework end-user processes and design appropriate training and support materials to help them use the new system and applications. But think beyond end users. When the vendor leaves, your internal support structure needs to be ready to manage and administer the application, as well as provide ongoing training and support for current and new staff.

Training and documentation requirements should be spelled out in the statement of work for both end users and support staff. Before you conduct your first class, review the vendor-supplied training material to ensure that the content is adequate and applicable. Where possible, eliminate generic examples and substitute real-world cases with which your agents are familiar. Skip material that doesn't pertain to them, as well as information on options and features that they won't use. Train on the "live" system whenever possible for realistic examples and functionality.

Schedule and complete training as close to system implementation as possible. Make sure that training resources are scheduled and available for onsite support during and after the cutover period.

8. CONDUCT THOROUGH TESTING

It's up to you to develop and execute a thorough test plan. Don't depend on the vendor, and don't let yourself off the hook by placing a few phone calls. Consider all applicable test types and assign responsibility and timeframes for developing test plans, conducting testing, resolving issues and retesting. Consider third-party testing specialists and services, if appropriate.

For any implementation that impacts users, conduct usability testing (for all functionality) with agents and SMEs to get feedback from actual users. Allow adequate time between implementation and usability testing to put the network and the system through the paces in the new environment. These testing steps include load, resiliency and disaster recovery testing.

For each test category, develop a thorough test plan with step-by-step instructions for exercising every function and use. For instance, IVR and ACD testing requires placing calls to every routing path and option within the path. Detailed test plans include templates for documenting actions taken, results and retest outcomes. Test all hardware including headsets and phones. Allow adequate time for correction and retest during all testing phases.

9. CONDUCT THOROUGH CUTOVER PLANNING

Planning for and executing the cutover plan is one of the primary responsibilities of the project team. Start early to ensure that you have time to cover all contingencies. Develop a day-by-day, detailed schedule of events for the cutover period, minimizing service interruption, and place the right resources in the right place

Best Practices for Effective Project Teams

An effective project team is a crucial part of every technology implementation project. The following best practices will get the team off to a good start.

- Communicate project structure, process and opportunities for input.

- Define the project phases and timelines so everyone on the team understands expectations.

- Define operations changes early to prepare Training and Change Management for organizational and process change.

- Include end users (including agents!) throughout the process as appropriate, but especially during design.

- Define decision authority, approval processes and key milestones.

- Identify and obtain agreement on project priority and resource requirements; put it in writing and spread the word.

at the right time. This plan should list the schedule, availability and contact information of key resources including vendor SMEs, internal SMEs, IT support, network providers and other critical-path players. Build contingency plans to address delays in equipment delivery, network upgrades and facilities issues.

Finally, develop a detailed fall-back plan should the cutover prove unsuccessful. Set criteria for invoking the fall-back plan and define who bears responsibility for the decision.

10. PILOT AND THEN ROLLOUT TO FULL PRODUCTION

Your best bet for a smooth transition to full production starts with a pilot — either a small team or limited functionality within a larger team. Despite the best-laid plans and a gaggle of tests, most implementations have a few "got-

chas" that can only be unearthed in a live environment. Decide how you want to conduct the pilot and schedule training for the pilot group. Line up vendor support so you can resolve issues quickly. Document and track findings to make sure issues are resolved to everyone's satisfaction.

Remember: A pilot is a production environment! Don't launch your pilot until you've completed all of your testing.

Have a rollout plan — by site, functional group, call type, etc. — that will go into effect once the pilot is deemed a success. Some folks take the "big bang" approach, going from pilot to full production in a flash. You may choose a more controlled approach that phases into full production.

A Successful Implementation Leads to Successful Production

To ensure ongoing success post-implementation, plan for the post-cutover period ahead of time. Define specific operations and IT metrics that you will monitor to identify problems early. Include a transition period of vendor support in your SOW (e.g., two to four weeks). If your vendor does not provide onsite resources for this period, get a commitment for timely resolution of issues. Take advantage of your collective focus to find and resolve the problems now.

Implementation is difficult. It is very tempting to move quickly to the fun stuff — using the new technology in your contact center. However, committing the right resources and time, and paying attention to details, will pay dividends. The investment you make in good implementation practices should yield pain-free production and increase the likelihood of achieving the value you expect from your new technology. ℗

Brian Hinton is a Principal Consultant at *Strategic Contact.*

✉ brian@strategiccontact.com
☎ (706) 310-0544

Matt Morey is a Lead Consultant at *Strategic Contact.*

✉ matt@strategiccontact.com
☎ (913) 681-5133

Steve Suhn is a Consultant at *Strategic Contact.*

✉ steve@strategiccontact.com
☎ (206) 933-7521

ABOUT US