



Optimize Current Technology

Chances are you are underutilizing your current contact center technology due to situations such as:

- **Applications installed without process change.** You implement technology “as is” to meet a target timeframe. You hope to achieve business value by implementing more change in “Phase Two” but before you know it, you’re on to the next priority. As a result, your “new” technology looks a lot like your “old” technology.
- **Lack of resources to leverage technology.** Many applications require dedicated, trained resources to achieve business value. The technology project funding request neglects (or doesn’t secure) budget for staff – just hardware, software, implementation and support. So “shelf ware” ensues or the resources you do have do the best they can in their “spare time.”
- **Loss of resources to effectively apply technology.** Trained resources are the “experts” that harbor unique knowledge. However, that expertise can walk out the door, leaving the contact center flailing. Other priorities inhibit efforts to re-hire or train new resources. So a perfectly good tool starts to rust or gather dust.
- **New capabilities came along when you weren’t looking.** Vendors are always adding to what a given system can do, through upgrades, feature additions, and adjunct systems. But if you’re not shopping, you may miss it. So that “next great thing” is just waiting for you to look up and spot it.

Chances are for these or other reasons you have opportunities to optimize your current technology! Use the table below to trigger ideas about items for your “to do” list to get more out of what you have.

Application	Representative optimization opportunities
Routing and Skills	<ul style="list-style-type: none"> • Keep routing simple, but define it end-to-end (considering the network, IVR and/or prompts, skills) • Define skills based on call type, not just for tracking • Let the technology do the work, setting conditionals and using skills to find the best available resource • Align technology, process, and people through training and career path definition
Reporting	<ul style="list-style-type: none"> • Define a metrics strategy tied to business goals • Focus on the right Key Performance Indicators (KPIs) and make sure you have a good source for each • Identify who will get what reports/metrics, how often, and in what form • Use available reports to address issues as they arise and optimize performance by identifying triggers and action plans • Train users (including agents) on defined reports and what they really mean • Minimize customization and exporting to Excel • Use trending and analysis to improve processes and optimize productivity
Scorecards and Dashboards	<ul style="list-style-type: none"> • Establish a scorecard/dashboard strategy, then educate and communicate how it relates to business goals • Differentiate between metrics with targets and those to monitor for trends and anomalies • Create a balanced view of overall and individual performance • Get the right data from the right sources, and present it in a simple way • Create response processes, both for real-time metrics and those being monitored for trends • Use information to help individuals raise their skills, focus the center on improvement initiatives, and recognize individual and team successes

Application	Representative optimization opportunities
IVR	<ul style="list-style-type: none"> • Use IVR best practices and report data to audit your system and identify changes to menus, flow, logic (even eliminating things where appropriate!) • Set up a routine optimization plan, including quality review and CSR feedback (including caller comments) to develop an action plan • Identify new applications to decrease agent volume • Determine if ASR will make an impact and pursue if appropriate • Integrate IVR applications with other technology • Build proper reporting into applications
WFM	<ul style="list-style-type: none"> • Establish WFM strategy by assessing needs, training staff, and setting up end-to-end processes and action plans • Work outside the tool only when business reasons demand it (don't reinvent the WFM wheel) • Make WFM analysts accountable to CC performance management and tie their success to the success of the front line team • Educate the front-line staff on KPIs and their role in achieving them
QM	<ul style="list-style-type: none"> • Create well defined, end-to-end processes and execute them consistently • Use QM to identify organization-wide improvements, including enhancements to training, systems and processes • Provide (timely) individual feedback in coaching • Create a holistic view of quality by capturing voice, data, and all forms of contact • Integrate QM scoring with other performance tools (see scorecards/dashboards)
CTI	<p>If you don't have it and can't afford it:</p> <ul style="list-style-type: none"> • Get as much information as possible to agents via other means (e.g., phone display, soft phone on PC desktop) • Look for low-cost ways to implement <p>If you have it, but have poor performance:</p> <ul style="list-style-type: none"> • Audit the system to define actions for improvement (e.g., populate contact info to improve matching rate) • Create end-to-end integration of all call center components
CRM	<ul style="list-style-type: none"> • Create a CRM vision and strategy (enterprise-wide, if possible) with defined roles for the center in marketing, sales, and service • Define processes and allocate resources to get maximum value from the technology (new workflows, clean/updated data, etc.) • Constantly evolve through IT and business collaboration and results assessments that lead to actions • Configure technology, don't customize
KM/Wikis	<p>If you don't have it and can't afford it:</p> <ul style="list-style-type: none"> • Gather "tribal knowledge" from cheat sheets, training, memos, etc. • Create a simple structure to make the information useful to all • Look for low-cost ways to implement (SharePoint, open source, etc.) <p>If you have it, but have poor performance or utilization:</p> <ul style="list-style-type: none"> • Use data, focus groups, or surveys to find out what is used and why, and what isn't used and why • Make changes such as: delete outdated information, improve search (e.g., through Google Search Appliance), restructure information, update information • Institute new processes that address the issues such as: routine review or updates, rewards for creating and sharing relevant/accurate/useful information