How to Evaluate and Select a Contact Centre Solution Provider

By Rod Jones   Ver 8.0   Revised: 01 May 2017

There is no doubt whatsoever that contact centre managers and executives ultimately responsible for delivering customer service, spend a great deal of time grappling with the fundamentals of runaways costs, declining levels of operational efficiency and productivity, increased business risk, ever increasing customer demands, increasing contact volumes and, the proliferation of alternative interaction channels. Added to these challenges are the realities of high staff turnover, low staff satisfaction, poor engagement and a raft of other issues negatively affecting the staffing or workforce aspects of the operation.

For many contact centres, exacerbating all the above are the challenges of aging technologies, poor integration into back-end and operational front-end applications and systems and the massive demands to appropriately meet multi-channel customer expectations; not the least of which being the onslaught and the impact of the social media.

Against this backdrop, research shows that at any given time, approximately 40% of contact centre management teams are engaged - to some degree - in the on-going process of investigating or evaluating new contact centre technologies. The probability is that even greater numbers of contact centre professionals are engaged with investigation of new technologies in the quest to drive down costs, increase efficiencies and productivity and ultimately, to provide the optimal Customer Experience. Given the diversity of operational pressures mentioned above, and based on day-to-day engagement with contact centre managers, today the figure is probably closer to 80%. This begs the question; Why this phenomenal upsurge in interest in new customer interaction technologies?

Any world class contact centre is fundamentally built on the principles of people, processes and appropriate technologies. Today, the term "appropriate technologies" has never been more relevant. The reality is that the term 'appropriate technologies' has a totally different meaning to what it meant even five years ago when a good, solid, big-name-brand ACD formed the hub around which all manner of disparate peripherals would be gathered and to some extent, integrated. The integration of disparate systems and sub-systems has historically been one of the most expensive elements of setting up, optimizing and managing a modern call centre or contact centre.

Given the realities of the hugely competitive marketplace and the rapidly changing nature of customers, contact centre management professionals must certainly be seriously considering some of the technical features and functions that sooner-or-later will no longer be 'nice-to-haves' but certainly, 'must have's'. In other words, many of yesterday's "Dream Technologies" have become today's Strategic Imperatives.

An advanced, multi-channel ACD is certainly a fundamental. The 'Universal Queue'; the ability to manage and route and report on an array of channels and media including telephony, email, fax, SMS/MMS, scanned documents, various social media channels and soon, video, is no longer an option. All-channel/all-media integration, voice and screen recording, interaction analytics, advanced quality assurance and handling and processing the massive impact of the various social media channels are realities to be tackled.

In today's cost-pressurized environment, it is vital to consider customer self-help by means of sophisticated IVR, natural speech, web, web-chat, machine learning and the incredibly complex, yet hugely rewarding world of mobile integration. Also, vital today is agile process automation and the drive to have integrated MIS that will enable the ability to take raw operational data and convert seamlessly, reliably and credibly into real business intelligence; the very stuff that the boardroom is demanding to enable the development of sustainable business strategies and tactics!

Today, the 'appropriate technology' for a contemporary contact centre is no longer sourced from multiple vendors and then cobbled together – usually at immense cost - to provide a "it-sort-of-works-some-of-the-time", solution. To achieve optimum operational performance, efficiency, and effectiveness in your contact centre, what is needed is a single, fully integrated suite of functional solutions supplied and supported by a single, credible and reliable provider with more than adequate local and regional support infrastructure and resources.

The organisation needs a business partner ready and able to walk the long road; to address the operational challenges and to be there to support the operation through changes in the nuances of the market, customers, staff, and a host of other realities.

In a recent webinar on the subject of selecting a contact centre technology partner, Nancy Jamison, Principal Analyst with Frost & Sullivan suggested that the first discipline is to "look at everything". First and foremost, look at your organisation's current functional requirements. What must the contact centre solution be able to do right now? Then look ahead. What will your functional requirements look like six or twelve months into the future? And what about in two or even five years from now? As fast as the market changes and as fast as customer expectations change, so too will the organization's technology needs evolve. What is required is a totally reliable vendor-partner who will be able to meet those needs; now and well into the future.

Now look at the complete range of the products and services offered by the prospective providers. Look at the breath, the depth and the forward-looking roadmap into the five and ten-year future. Consider how the vendor has built their core offering. Is the vendor able to claim and substantiate years or even decades of on-going research, development and refinement of their technologies or is the offering a quick cut-and-paste 'solution' built on the back of one of those freely downloadable frameworks? Cheap is usually very nasty!

Or is the proposed solution the other kind of 'cut-and-paste', where the ACD or contact centre solution vendor has acquired various third party companies, technologies or functional 'bits and pieces' and brought several disparate technical elements together under a single brand? But in the background, it's probably a morass of 'just-enough-integration-to-make-it-work'.

What genuine 'Big Name', internationally recognised partnerships or certification can the proposed vendor claim? Can the solution be deployed either on premises or as a hosted offering - or as a hybrid model? Is there sufficient evidence of this or is it merely a theory? Are there existing local customers using the offered hosted solution? Who are they? Is the hosted platform located locally or off on the other side of the planet?

Now let's look for well-proven expertise in your specific vertical. Again, is this so-called experience theoretical or are there tangible, referencable case studies? Are there local sites and local deployments of the offered solutions that you can actually visit and evaluate? Does the vendor have true global coverage? We no longer cower in the relative comfort of an industry village. Like it or not, as buyers of customer contact technologies, the world is our oyster. Our success in business no longer knows any geographical boundaries; neither should our technology partner have such constraints.

Ask if your prospective solution provider can offer you a "try before you buy" or a Proof-Of-Concept option? Or will it be a matter of *"Pay us and we'll build it for you"?* It is vital to listen to what the industry is saying. Keep one's ear to the ground. Network. Ask questions at industry functions and events. Ask the local industry analysts, independent consultants and guru's. In this space one needs to listen to rumours and gossip - and then to check these out. Often, they are real! There's never any smoke without fire … somewhere! Find the vendor whose financials and reputation in your local operational environment is impeccable. Let's face it ... on the human and personal world very few would marry a partner with a 'tarnished reputation'.

Quite apart from any technical specifications and other promises, who are the actual people that you and your colleagues will have to deal with on a day-to-day basis? Not just the suave pre-sales executive and the business analyst, nor the nerdy young junior technician who arrives on your site to do the installations. Ask who's going to be with you at three a.m., wrestling with a very real technical challenge? Ask who's going to be with you in the boardroom supporting your case in front of your board or executive committee? Ask who's going to fix the issues when things go wrong? Consider: Will you have direct access to experienced, senior engineers to work with you and your organisation to integrate and to fully operationalize and optimize your contact centre? In this context one must mean people on the ground right here; on your site and not flown in (usually at immense cost) for a couple of days just to solve some minor issue.

Like any marriage, it's going to be the domestic budget - the financials - that will ultimately be the real test of the relationship. So, ask from which side of the tracks does your prospective technology provider come? Is it from a good, frugal family? Are there the resources to weather the inevitable storms of the global IT industry? Will your vendor partner still be there to provide and support you well into the future? Your Financial Director will know what to look for and what questions to ask! Aspects such as R&D spend are important, just as are the bottom-line profits of the vendor. You and your organisation want your contact center to be successful, so partner with a truly successful organisation. One that has shown consistent growth over a long period.

Next, start looking at your prospective partner's actual installed customer base. In this context, look at the LOCAL customers, not the so-called customers "in the States" or elsewhere. Ask: "Where are the customers I can meet and see or call tomorrow morning?" Ask: For how long have they been customers? Are they delighted customers? Ask if you and your colleagues can talk to them one-on-one?

As the quest for an appropriate technology provider heats up, the exploration gets a whole lot more interesting. And some questions that you need to ask, get a lot more probing. For some vendors, your questions can get to be downright embarrassing for them. For example: How long has your company been in business? How flexible is your solution and your platform? Can you show how your solution has moved with the changing demands of the market? Is your R&D abreast of the challenges of the new channels? How many people are employed in your R&D facility? Have there been cutbacks in R&D or expansion of these resources? Is the organisation financially successful? Is the organisation truly abreast of leading-edge trends and technologies and how is the company going to make sure that your organisation's contact centre is ready for these challenges?

Next, it is recommended that all those tasked with selecting the new technologies meet the vendor's real management team. Ask how long each of the managers or executives have been with the company? Ask how much real, practical experience does the management team have with the actual solution that they are offering?

Ask how committed the vendor is to your region and to your country? What real regional and local investments in infrastructure, manpower and skills development and skills transfer can be shown? Is the offering that your organisation is considering presented by a distributor or by a channel partner who may or not be with you tomorrow when alliances change or business units are shut down for reasons that one may never be able to fathom?   Or are you dealing directly with the developer; with the very source?

Conclusions

The global contact centre industry is at a fascinating cross-road. In the last two to three years, the entire 'customer environment' has been turned upside down. Customers are more knowledgeable, more demanding, more aggressive, more fickle, less loyal and more frugal. And the same can be said for the executive decision-makers in most organisations. In the world of contact centre technologies, 'buying the largest well-known brand' is no longer the only astute decision. Today, fact-based and knowledge-based decisions are the only ones that count.

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