10 Steps to New Call Center Technology
by Mitchell Lieber

The right technology can make your contact center sing with higher productivity and performance, better reports which enable better management, improved service and/or increased sales.

Some companies want to choose call center technology in a matter of two days. These firms often pay for hastiness when the solution no longer meets their needs shortly after deployment. They either hobble along with inadequate technology, or throw it out and try again. Either way, operations and results suffer. There is a huge upside to doing it right and thoughtfully the first time.

Here are the 10 steps to employ in the selection of call center technology. Properly performed, this process can help a business make a better choice as it considers the many potential vendors, whether with a consultant or on its own.

The 10 steps are:

1. Define needs in detail, in writing, for today and future years.

2. Identify technology that appears to meet the "must have" needs.

3. Issue an RFP (request for proposal) that asks vendors to describe, in writing, how they can specifically meet each of your business' stated needs.

4. Review RFP responses and clarify ambiguities in writing.

5. Check with user group members and newsgroups for feedback on the system.

6. Check references.

Twelve Common Errors in Selecting Contact Center Technology

- Needs and requirements are not fully defined.
- Growth and changing needs for the next 3-5 years are not projected.
- Workforce management system that is sold to the call center is a poor fit and useless.
- Recordings, or their retrieval, are awkward.
- Business continuity for system outages is not planned, especially for cloud systems.
- Selected product is incompatible with one or more existing systems.
- Reporting capabilities are limited.
- I.T. or call center management make the purchase decision independently rather than collaboratively.
- Thoroughness and getting expert advice where appropriate, are sacrificed for a quick decision.
- The full cost of vendor professional services, upgrades, training, and maintenance is missed.
- Cloud phone system per-minute usage costs for calls are not compared to current costs.
- Contract has no effective purchaser guarantee and insufficient buyer options for vendor non-compliance in key areas.

7. Select finalists for site visits.

8. Kick the tires of finalists by visiting an operation similar to yours, which is using the technology in a similar way, and asking tough questions.

9. Review and revise the contract making sure to incorporate the RFP response and making sure to have it reviewed by a competent attorney.

10. Develop an implementation plan and timetable with the vendor and incorporate it into the contract.

Each step requires a thorough approach.

For example, if your enterprise needs customization, it is beneficial to design it up-front and incorporate it into the contract. Pricing, guarantees, and service are often very different in the pre-sales period, because the vendor is trying to close the deal in a competitive environment, and post-contract.

* These are general recommendations. Specific strategies and tactics should be based on a review of your needs, market and operation. For outside support contact Lieber & Associates.