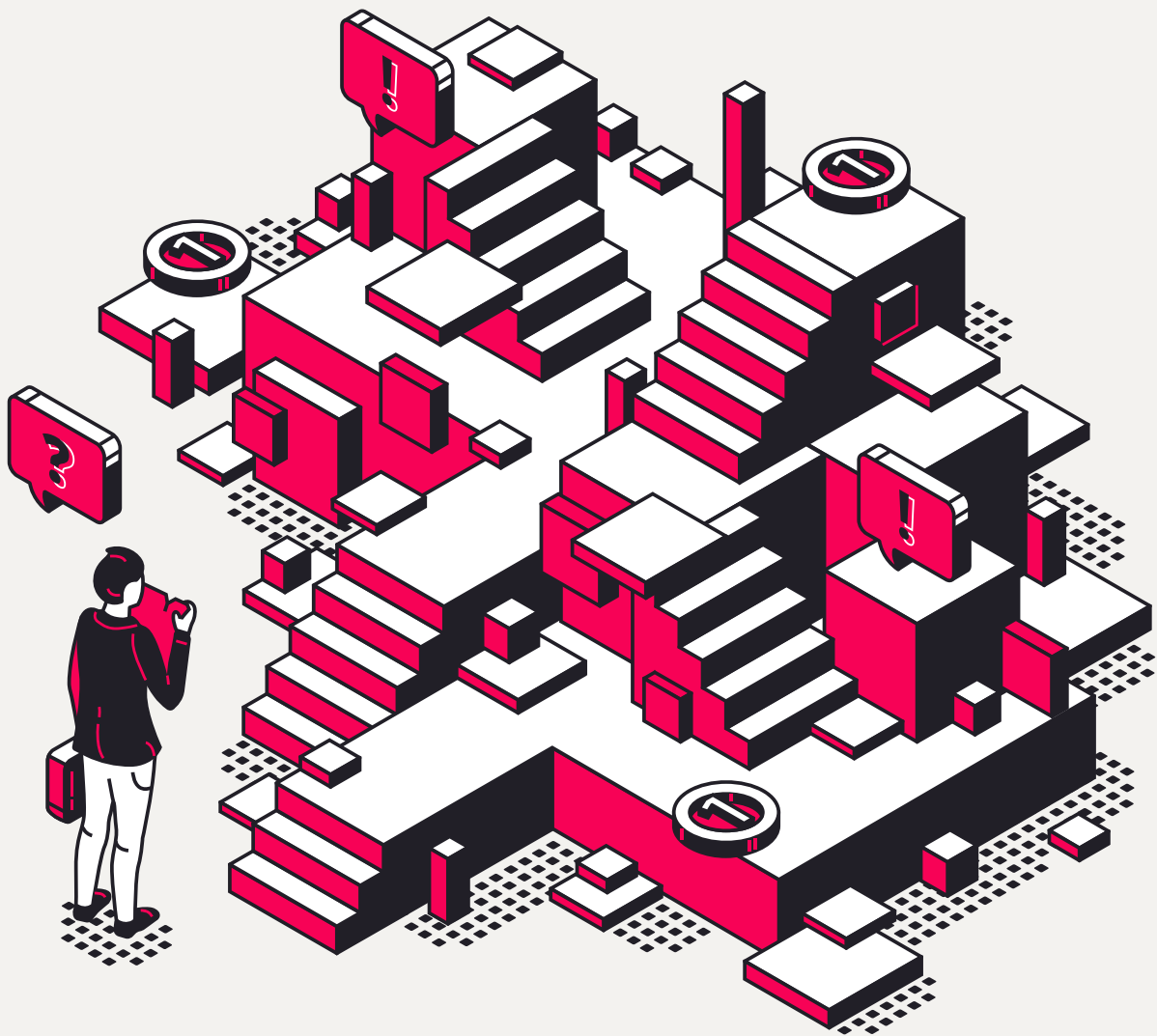


# Optimising contact centre procurement

Practical approaches, based on our experts' first-hand experience



**CONNECT**

Whitepaper

# Contact centres: the seven-year itch

It's suggested that, on average, businesses only replace their contact centre once every seven years.

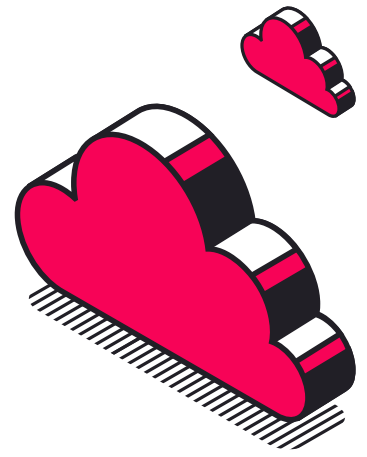
But for many involved in the decision, or the implementation, even that might feel too often. It's often been a painful and protracted process, resulting in disagreement and disruption, without immediate discernible benefit.

But when it comes to technology, seven years is effectively a whole generation. Capabilities have evolved and the vendor landscape has transformed. At the same time, customer habits and contact preferences shift, as new channels are adopted.

That's true of every seven-year cycle, but this most recent one has seen even faster change, driven by the maturing of the cloud contact centre model and of course the pandemic.

Organisations that haven't yet moved their customer contact operations to the cloud now recognise they must. Many others, who have opted for some form of combined approach such as piloting a cloud solution alongside their on-premise platform, are now ready to make the leap.

In short, hundreds of organisations are facing up to the reality that it's time to begin the contact centre procurement process once again. So how can you do it better this time?



**This paper draws on the experiences of Connect's contact centre leaders, plus independent experts in the field, to set out some practical approaches to enable a less painful and more effective procurement process. It focuses on how you can select the right contact centre technologies for your needs and find the right partner, or partners, to make it happen.**



# Business first: involving colleagues before you engage the market.

For contact centre managers, who have spent years looking on enviously as more and more of their friends have been able to acquire state-of-the-art technology, the moment they get the nod for a new solution feels like a release. The temptation is to go out to the market straight away, issuing pre-qualifying questionnaires based on the shopping list of requirements they've built up over time.

But in our experience, this is counter-productive. It leads to confusing requirements and, frequently, conflict further down the line, when it's apparent that the needs of a particular department have been (inadvertently) overlooked.

The more effective approach is to start with the business needs. Identify the right people to be involved in the decision and understand what capabilities they need from a contact centre today, and might like from it tomorrow. From that point, you can make some clear decisions about the 'must-haves', and start to prioritise additional elements, in alignment with your overall customer relationship management (CRM) strategy. Focus first on the requirements, before you start selecting technical solutions or prospective partners.

This requirements-led approach provides a solid basis for determining what elements – if any – of the existing platform you might like to retain, what you need to add and what you no longer require.

This kind of collaborative, open discussion has another benefit: it helps align internal teams together towards a common goal. One of the more frequent causes of pain in the procurement process is tension between departments, whether over budgets, or a team's needs being ignored.

Those tensions can come to the fore even after the target solution is initially agreed. Teams might suddenly identify additional requirements; new personnel may bring new ideas.

There are countless tales of organisations that, having defined a clear vision, never fulfil it, because **they end up distracted by adding point solutions**. While you don't need to be dogmatically strict about never changing the scope, it's worth documenting that initial agreed target contact centre, and securing clear buy-in to it.

# Preparation: getting the right advice.

Having established the fundamental business requirements, there's a further step that pays dividends before starting the tender process: talking to an expert consultant, with a real understanding of the current state of the market. The sheer range of competition means that it's very difficult for anyone in-house to know all the main players, let alone the emerging and niche ones. Consultant input can help you learn not only about who to reach out to, but also the different potential routes to your desired outcomes.

For example, a business with an existing high-performing contact centre will probably have invested in some form of workforce optimisation (WFO). That might include mature solutions for quality management and workforce management and scheduling. Potentially it includes speech analytics, on top of the call recording. Initial scoping discussions might have led the business to the view that it should move from its current multivendor on-premise solution to a single cloud provider, following the much-loved 'one ear to bend' principle.

However, the chances are that the cloud solution – at least initially – wouldn't be as finely calibrated as the existing WFO toolset. A knowledgeable consultant can help explain the likely outcome of that in terms of impact on the business, in comparison to retaining the WFO solution and integrating it with the cloud contact centre.

**In our view, the right consultant advice can end up saving you money, and time**

The other crucial role a consultant can play is in helping fine-tune the requirements specification before you go out to tender. They can anticipate likely questions or considerations from the vendor side, and pre-empt them. The outcome is a clear specification that bidders can readily understand and respond to. That not only makes it more likely that they will want to bid – after all, it's a labour-intensive process their side. More importantly, it also means they can focus their efforts on identifying where they can innovate and add value, instead of spending time clarifying a vague brief.

**It's worth pausing here briefly to acknowledge the howls of protests about the costs of getting consultants in to advise on the procurement process. In our view, the right consultant advice can end up saving you money, and time. Better still, it makes it more likely you'll get a solution that meets your needs. But the key word here is "right"; the value here comes from having a consultant with that in-depth market knowledge, rather than a generalist. You want their advice on the market, not their help in documenting the process.**

# One lead vendor.. or one lead partner?

We've already highlighted the challenges involved in procuring a solution in today's diverse market. The traditional core contact centre vendors are mostly still present, but their offerings are evolving fast to keep up with big brand cloud vendors like Amazon, Microsoft and Google. Point solution providers are proliferating, but also stepping out of their established niches. In a modular, cloud environment, dividing lines between CRM and CSM are blurring; voice is increasingly part of unified communications.

Talk to almost any of the vendors, and there's a fair chance they'll tell you their solution set can meet all your needs. They may even be right.

But whereas in the old days, a single vendor solution was a promise of safety, with compatible features and one point of accountability, today the opposite may be true. Vendors that are strong in one component or discipline may be uncompetitive in others. And the need for traditional systems integration – slow, costly – is diminishing as solutions become increasingly modular.

**Instead of choosing a single lead vendor, then, there's a growing case for a lead partner: one that offers expertise across multiple vendors and technologies, and that can help businesses pick the right ones for each part of their solution. Above all, it's crucial that the partner can grow with you and deliver on the full vision and roadmap, rather than simply implementing a minimum viable product and walking away.**



# Focus on value, not ROI.

Rightly, businesses are placing more and more emphasis on ensuring they follow a robust selection process against transparent criteria. But we're aware of plenty of procurements where this ethos has led to an unhealthy and unconstructive focus on measurable elements – notably return on investment (ROI). This typically results in long, and increasingly heated, discussions between Finance and IT as to whether the vendor's ROI claims are credible. More case studies and references are requested, delaying the process at a pivotal moment.

The reality is that a financial ROI is almost always a best-case projection; as you would expect. Realising the full figure requires a lot of things to fall into place. It's a useful point of comparison between different bids, but it shouldn't be the only one.

The value a new contact centre can deliver is far broader than simply financial ROI. Depending on the business needs agreed at the start, the new solution is likely to:

- enable the business to perform essential tasks more effectively
- add services and opportunities that it can't currently provide
- enhance the customer experience, increasing retention, satisfaction and lifetime value, potentially far beyond the lifetime of the solution you're buying!

Looked at from another perspective, a new solution should also reduce risk, perhaps associated with end of vendor support for the legacy platform or – to draw on a scenario that will feel very close to home for some – to minimise disruption if staff can't work from a physical contact centre. Put another way, can the business do without the extra resilience that one vendor offers, even if that diminishes ROI in pure financial terms?

**There is no doubt that these elements are harder to measure and evaluate than ROI, where the comparison is in black and white. But when ROI itself is not guaranteed, is it time to reconsider its continued pre-eminence in the selection criteria?**



# Make space for innovation.



Unsurprisingly, the majority of our major contact centre projects over the last few years have been around helping clients move to the cloud. They've also tended to follow a similar pattern: organisations have wanted a safety-first phased approach, built around a large-scale implementation – using a waterfall methodology – to create a minimum viable product. Typically, that means replicating the majority of their current feature-set in the cloud.

Once that's up and running, they can then look at innovating and adding new capabilities.

There's a clear logic to this. The contact centre is business-critical – especially for some of our largest banking customers. There's ongoing suspicion about the reliability of cloud solutions (typically, we should acknowledge, from business sponsors and decision-makers, who don't have a full understanding of how it works).

In many cases, this cautious approach proved its worth as the pandemic hit. The cloud solution, which had been running alongside the on-premise one, could simply be scaled up to enable advisors to work from home. Teething problems had been ironed out; now, new capabilities could be simply switched on.

One perfect example of this was around taking card payments. On a cloud solution, it was possible to simply switch on a PCI compliant feature, so that advisors could take payments by card securely, even if they weren't in the office.

By contrast, those without a cloud solution – and we've heard of several large organisations that found themselves in this situation – had to suspend card payments until staff could go back into the contact centre, where the on-premise platform had the right capability.

The modular and more open nature of cloud solutions does allow you to add capabilities at speed, and in cases like PCI, the decision was easy. But we also are well aware that in many organisations, the biggest cause of delay is the time it takes to make a decision. New features are proposed – maybe by an in-house team, maybe by a partner – but there's then no established process for evaluating them. This means that the potential for competitive advantage can get lost.

**Making the most of the flexibility of a cloud solution isn't just about having agile processes to implement new features; there needs to be agility in the decision-making too.**



# Enhance, before you transform.

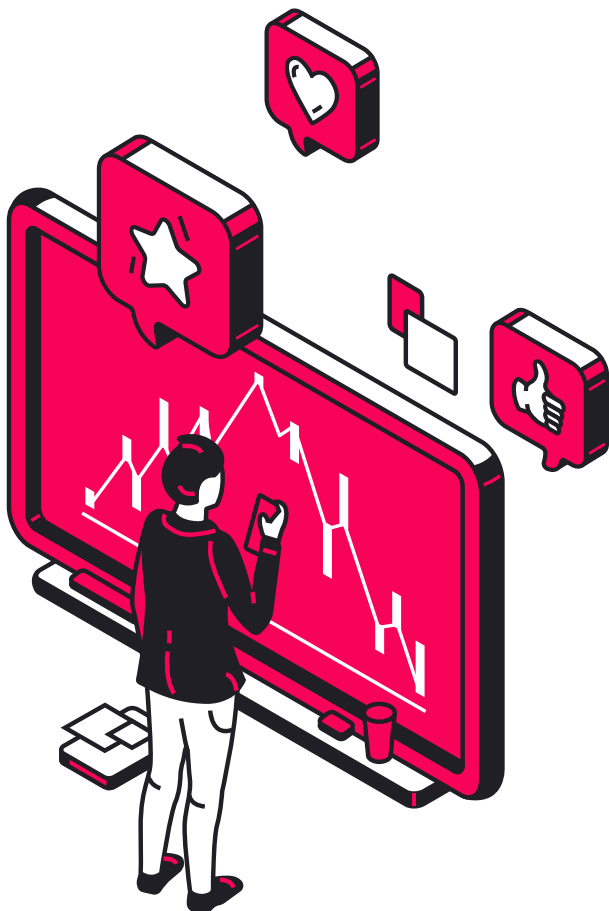
In fact, that same principle extends to the on-premise solution. We've frequently found that once organisations start on the journey to their new contact centre, the existing platform is essentially locked down.

But this can be a missed opportunity. There may be invaluable additions or enhancements you can rapidly make to your current set-up, that will deliver immediate value and provide vital insights for the future contact centre.

A perfect example of this was a retailer we worked with, that had determined a long-term transformation to a cloud contact centre. However, the team recognised that advances in automation offered an opportunity to enhance the customer experience – supporting self-service and helping manage incoming call volumes. We helped them add automation into the call routing and handling on the old platform. This proved immediately effective, and gave the retailer the opportunity to test and learn, sharpening scripts and addressing process issues.

This work will then provide a further benefit as it moves to a cloud environment, with greater scope for automation.

**The key here was an understanding of the business value that introducing automation would bring. And that came from an environment where the contact centre was understood to be an integral part of the overall operation and customer experience, rather than a separate entity.**




Returning to where we began, the relationships built in preparing the route to contact centre transformation provided the insight for a business-enabling change, delivered at speed. Whether selecting the right contact centre technology, or any other technology, that is the optimum combination and the optimum result.

If you're preparing to procure a new contact centre solution, and would welcome an independent view of the options, get in touch with our Professional Services team today. **We offer bespoke advice, based on proven expertise with a vast range of solutions and vendors – and we're not tied to any of them.**

## Connect with us.

To discuss a communications challenge or find out more about our capabilities, get in touch with us today.

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