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Strategic Planning Required for a Successful Contact Center Platform Migration

White Paper

The Northridge Group

One of the most fundamental technologies powering any Contact Center is its voice and omni-channel routing and management solution. The contact management platform not only routes and queues customer interactions, but is also the enabling or limiting factor to deploying advanced capabilities required to enhance customer experience and lower operating costs.

When contact center leaders seek to improve performance or provide truly differentiated customer service, they consider enhanced capabilities such as Courtesy Callback, presence management, and Omni-channel integration. Too often their outdated contact management platform does not offer the advanced capabilities required to meet the ever evolving consumer demands for enhanced service.

This leads to the need for a truly significant change of upgrading or transitioning to a new contact management solution which is a large investment both in terms of money and operational impact. Changing your core contact management platform has many dependencies and requires a comprehensive understanding of the impacts to other contact center technology, existing process and operations, reporting / KPI management, and nearly all aspects of the contact center.

There are 5 critical considerations when assessing whether or not migrating to a new contact management platform is the right move.

An effective planning process includes assessing the following areas:

1. Current and future state capabilities required to achieve desired Customer Service goals and expectations

2. Network readiness and implications to telephony and other contact center technologies

3. Impact on operations, process flows, and agent skill sets and career paths

4. Cloud vs. Premise based solutions

5. Financial analysis and Business Case development

CURRENT AND FUTURE STATE CAPABILITIES REQUIRED TO ACHIEVE DESIRED CUSTOMER SERVICE GOALS AND EXPECTATIONS
Not all contact management platforms are equal. While all of the leading platforms effectively handle core call management and routing functionality, they each offer different strengths and capabilities.

Documenting required capabilities for each of your primary contact types is a good first step. Then, develop a matrix of required functionality from which to assess the fit of each vendor's platform under consideration.

Most enterprises have a near term and longer term customer service strategy that must also be factored into the assessment. It is important to identify the capabilities that are needed now
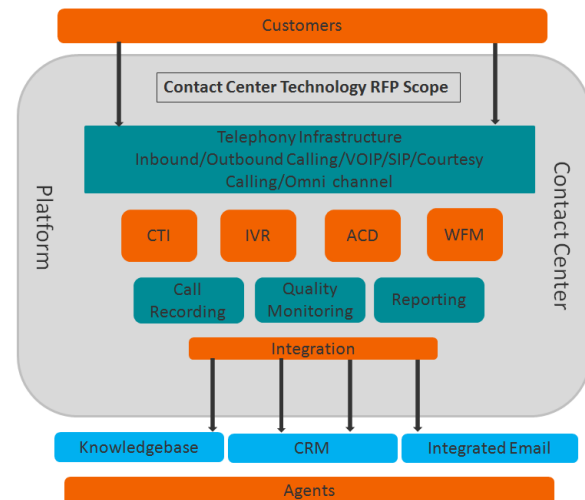
and the core functionality that will be required to achieve your future state objectives. For example, you may need an integrated chat solution to drive resource efficiencies in handling these interactions today but want to build a full, end-to-end Omni-Channel solution for the future. Northridge can help define the art of the possible tailored to your unique business challenges and priorities while leveraging best practices and insights from leading brands across all business verticals.

NETWORK READINESS AND IMPLICATIONS TO TELEPHONY AND OTHER CONTACT CENTER TECHNOLOGIES

The contact management platform is the core foundation for any contact center, so making a change here impacts all other areas of the Contact Center. Is there functionality that is embedded in this new solution that enables decommissioning of another system? How well do all of my other systems integrate into this new solution? Will I be able to see the end-to-end customer experience across channels? All great questions that warrant consideration.

For an effective transition, you need to assess any implications to your telephony network (capacity requirements, trunking methods, etc.) along with all of the integrated solutions that must work seamlessly in the new environment. This includes your IVR, CTI, CRM, WFM, QM, Speech Analytics, etc. To drive a more integrated and predictive experience, it is also important to align with your online, mobile, and big data strategy.

Common Connected Systems

IMPACT ON OPERATIONS, PROCESS FLOWS, SKILL SETS AND CAREER PATHS

While the technical requirements are foundational to any solution migration, it is critical to align the vendor selection and design process tightly with the operational strategy, resource structure, and business processes. It is important to evaluate how the new solution can enhance and take your customer experience and operations to the next level of performance throughout this process. Focusing on the desired future state ensures you are taking full advantage of the new functionality and also redesigning your customer, business, and agent processes where needed.

Successful migrations will vary by many factors: organizational size, variety of contact types, new functionality added, operational change readiness, etc. Typically, enterprise level migrations range from 6 to 18 months.

CLOUD VS. PREMISE BASED SOLUTIONS

An additional consideration, beyond the vendor, is whether or not you want a premise based platform or a cloud solution. There are pros and cons to both approaches and the right answer is highly dependent upon each enterprises' strengths, weaknesses, requirements, and operating preferences.

Consider your IT resources and capabilities. Does your organization consistently have the deep technical experience and the resources available to manage an on-premise environment? If not, cloud service may be more attractive. Also consider how your company finances investments. Do you prefer extending capital upfront and depreciating assets, or does your Finance team prefer pay-as-you-go subscription models that tend to involve more OPEX and less capital?

Other factors, such as: complexity of your business, which Advanced Features you will use and how much customization you anticipate should also be factored into the premise vs. cloud decision. More Advanced Features and customization required may lead you to the premise based solution. Other factors to consider include: the frequency of ramping up and down resources, agility and speed required to support business changes, ease of integration, security, and ongoing maintenance.

Much like with the capabilities assessment, developing a matrix with key considerations and then evaluating the attributes of premise and cloud platforms will lead you to the right decision.

FINANCIAL ANALYSIS AND BUSINESS CASE DEVELOPMENT

Another critical step in the migration planning process is to develop a strong business case, incorporating the financial impact.

Outline the business benefits to be derived from the new platform. Include the impacts of cost savings from IT and operational efficiencies. Include potential revenue impacts from improved customer experience, lower churn, etc. Consider all benefits, apply sound logic to your calculations and be conservative. Your Finance and Executive teams will appropriately hold you to those assumptions!

Estimate the costs of the new contact management platform, including: licensing, hardware, maintenance, integration costs and upgrades required to the other contact center systems. Also, develop a Total Cost of Ownership model with a multi-year view. The business case should factor in the level of effort required to operationalize the new platform. Include not only the technical costs, but also the impact on operations.

IN SUMMARY

Migrating your contact management platform may enable transformative changes to your customer experience and operations. The investment and associated business impact is significant, so a well-designed plan leveraging an experienced partner will increase the likelihood of success and accelerate the benefits realization.

The Northridge Group

The Northridge Group is a leading management consulting firm specializing in advanced data analytics, end-to-end customer experience, and cost transformation services.

Founded in 1999, the firm services Fortune 200 clients in the healthcare, telecom, financial services, travel and transportation, and retail industries, as well as key government agencies.

The Northridge Group is a GSA PSS (MOBIS) federal government schedule holder, as well as a WBE-certified women-owned business.

Contact

The Northridge Group
9700 West Higgins Road
Suite 600
Rosemont, IL 60018
P 847.692.2288
www.northridgegroup.com
@NorthridgeGroup