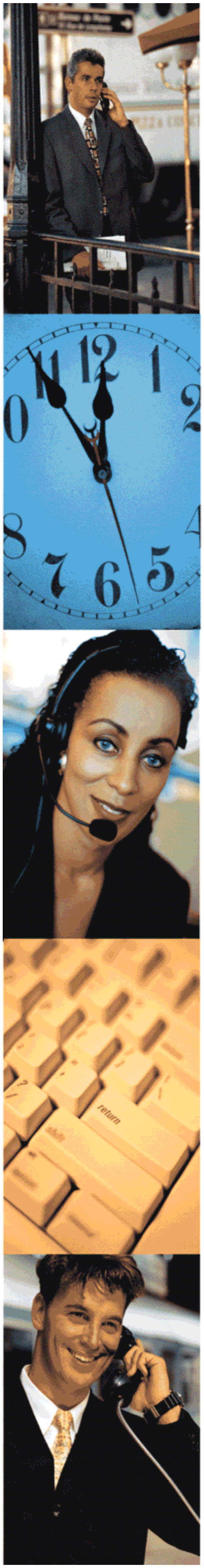

Reduce the Stress of Selecting Your Call Management System

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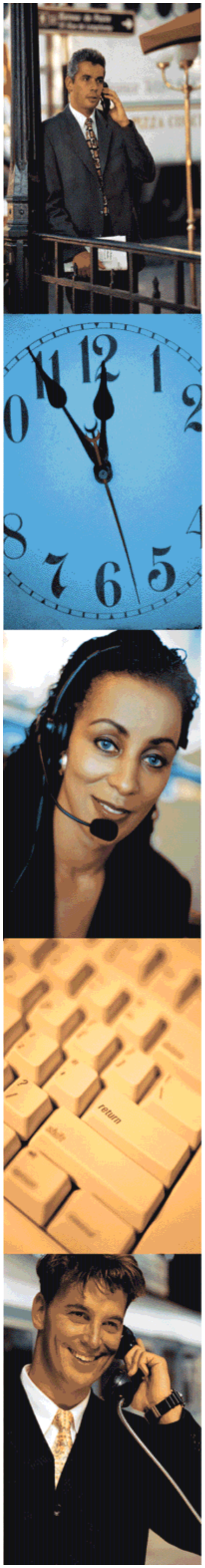

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Reduce the Stress of Selecting Your Call Management System

So, you need a new call management system…As your company's Customer Support Manager, you've just been informed that you have successfully justified to your senior management team the need to replace the homegrown call management system (CMS), in place for the past 7 years. They sincerely understand your team's pain in trying to manage customer tickets, utilizing technology that was originally developed as an interim solution with but one requirement – a place to log calls. That's right - no escalation, no querying for historical client or product data, no easy way to provide your management team with daily and monthly reports, no knowledgebase, etc…

Don't worry! You are not alone out there. Every Customer Support Manager who has ever received approval for call management technology has had to decide how they would now find and select the best solution for their company. Many times, adding to the challenge of taking those next steps is to move quickly and efficiently before your system is shaved from the budget until next year.

Throughout this paper, I will provide you with a methodology I have successfully utilized both as an employee and a consultant to select and implement the best technology for the client's need. My goal is to provide you with a framework to progress through the process in an organized way, resulting in an educated decision based on your research. Let's eliminate the need to make a decision on your "gut feel" with the salesperson or the vendor. Along the way, I will also include some valuable tips, which I probably discovered the hard way.

To make the process of selecting a call management system easier, I have broken it down into the following steps:

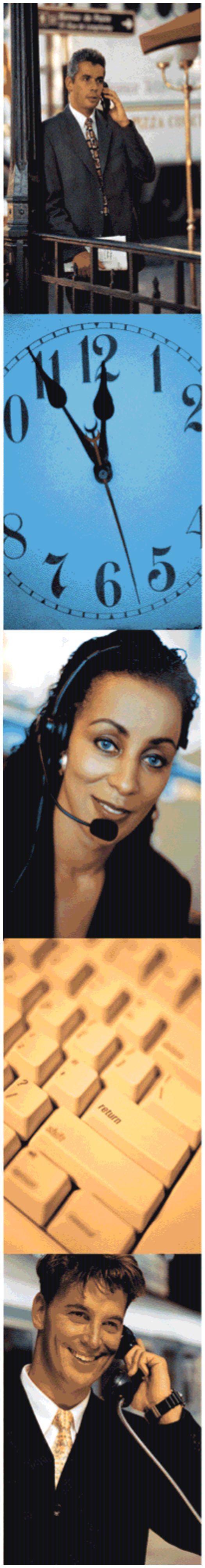
- Identify a Project Manager & Create Project Plan
- Create a Requirements Document & Identify 12 Vendors
- The Request for Proposal (RFP) Process
- Onsite Demos, Reference Checks, Site Visits
- Selection, Negotiation, and Wrap Up

In the following sections, we will examine each step in greater detail.

Identify a Project Manager and Create a Project Plan

The vendor selection and implementation process should be viewed by your company as a critical project, impacting cross-functional teams. Every project requires a project manager and a project plan. Thus, this first step involves identifying someone with the background and skill set to lead your project. In most cases this is either yourself, the person with the largest stake in the success of the project, or an experienced consultant hired to work with you in driving the selection and implementation process.

Now it's time to share your CMS Project Plan with the rest of your management team, along with anyone else involved with the project. Hold a scheduled CMS Kickoff Meeting, confirming that all key managers and players are available to attend. The meeting should be no longer than 90 minutes, with the goal being to review the CMS Project Plan and gather attendee feedback. Key areas to be aware of are conflicts with task owner's available time and also other major projects on the table that are running parallel to your delivery dates. Remember, this project may be number one for you, but your peers are most likely juggling multiple priorities of which your call management system is but one.



> **Tip:** Be sure to allocate the proper amount of YOUR time for this project and communicate this to your management team. Don't underestimate! If you are the project manager, you will have to offload some of your "day job" responsibilities in order to properly lead this project to a successful completion.

Create a Requirements Document and Identify Potential Vendors

Now that you have a project manager and a project plan, it's time to define your functional needs and identify potential vendors with whom to open discussions. Both these tasks can and should be done in parallel.

Let's start by gathering your company's operational and user requirements. Schedule time with any cross-functional team's manager or vendor who will be inputting, accessing or expecting data output from your call management system. These managers should have already attended your kick-off meeting, so they are aware of what information you will need from them. Sort their requirements into "must have" and "nice to have" buckets. A vendor who cannot meet all your "must haves" should be eliminated from the pack. Don't forget to setup meetings with the managers that own and support your operational infrastructure. Your new application will require a server (or two), a system administrator to perform backups and regular maintenance along with possible integration to system monitoring tools and the Internet. Will this application be implemented in an Oracle environment? Will you require notification to subject matter experts via Lotus Notes or Microsoft Outlook? Will you be auto-paging these subject matter experts through a specific cell phone or pager provider? Will you have any remote users, or will all people entering calls be in the same building? Gathering answers to questions like these will greatly help you pare down the vendor list to a short list of qualified candidates.

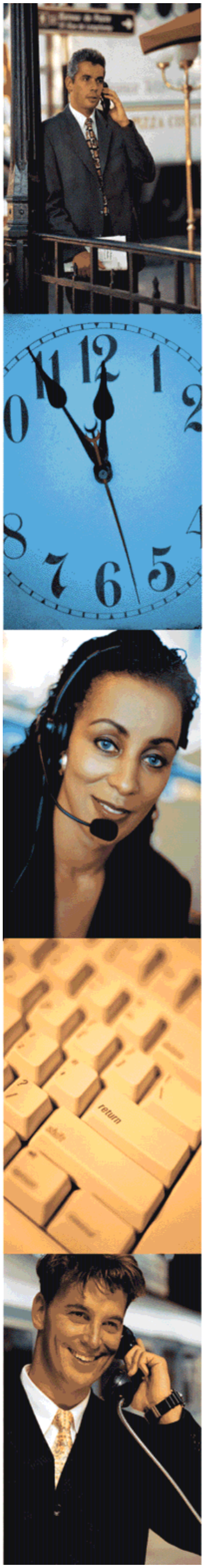
The only thing missing now is your list of vendors. It's time to utilize your investigative skills that you may not even have known you possessed. You need to build a list of ten to twelve call management system providers from the 100+ that are out there. Tap into your customer support and technical staff to find out what products they have used in prior companies, and find out if they were satisfied with them. If they were extremely satisfied, get a contact name from their former company and give them a call.

> **Tip:** Prior to making this information-gathering phone call, it would greatly help to have a questionnaire at hand to ensure you gather all the information you need in one phone call. Questions should solicit information on the company's experiences with the implementation, training, documentation and technical support, as well as the number of actual users versus licenses purchased. This questionnaire will also be used later during the formal reference checking of your short list of vendors.

In addition to tapping your employee base, send your professional network (you know you should have one) an email telling them what you are doing and asking if they have used any superstar vendors they would recommend.

Don't stop there! Jump on the Internet and search through some of the support industry organizations and magazines for vendor rankings and articles. Check out the vendor's websites and cruise through any online demos that may be available. If your organization has an online membership to The Gartner Group, or other such organization, you will be blessed with a wealth of information and vendor evaluations.

Once you have the Requirements Document and your short list of vendors, it's time to give them a call. An important question to ask them is their average cost of an implementation of your size. Also ask where they see themselves fitting in the call management space regarding price. Are they low-end, medium, or high-end? Functionality will follow price, so the high-end vendors will usually carry more bells and whistles, along with unlimited customizations. Be careful with customizations as this



can sometimes mean professional services fees for any future changes to those customizations that seemed so important in the beginning. If you are satisfied with their professionalism and responses, email them your Requirements Document. Instruct them to respond to each of your 10-15 requirements, including providing you with the number of live customer sites they have utilizing each particular requirement. For example, if operating in an Oracle environment is mandatory, you do not want to hear that their first Oracle implementation will be in 4-6 months. If that's the case, you have just shaved the competition by one vendor.

At the conclusion of this research and evaluation, you should be able to confidently reduce your list of vendors to no more than five, three would be ideal.

The Request or Proposal (RFP) Process

By now, you should be well on your way to making an educated decision about what product and vendor can provide your company with the best solution for your call management needs. At this point, you should have three to five vendors that you've identified as solid candidates.

> **Tip:** As you pare down your list of vendors, be sure to communicate the right message back to the account manager with whom you opened discussions. If they are definitely out of the running, for whatever reason, let them know so they can take you off their prospect list and move on. However, if they barely slipped out of the top three, you may need to reengage them down the road if your top three choices falter. Let the account manager know this also, but tell them you will call them, if needed.

Now it's time to really drill down into the product capabilities and vendor's reputation and professionalism. This is my favorite part of the search process because of the product and industry knowledge you can absorb.

Let's get the Request for Proposal (RFP) process rolling by creating the document.

The RFP should begin with an overview of your support environment. Be sure to include the number of users, the number of customers supported by the team and any integration requirements. Although you have already reviewed this with the account manager, put it in writing, because the person responding to this RFP may not be the account manager you've been dealing with.

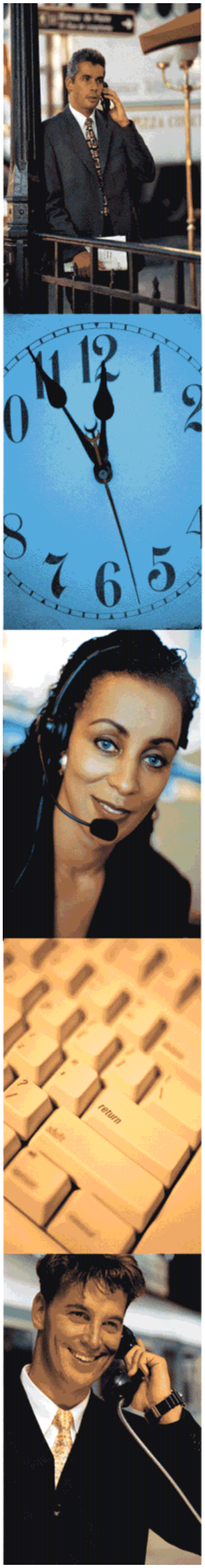
Next, create a number of questions probing for specific detail around their product's architecture, training & implementation process, and problem management. The difference between the RFP Document and your initial Requirements Document is this: If web functionality is a "must have" for your company, you would have included that in the Requirements Document. In the RFP, make them tell you how it works, how many live installations they have utilizing web functionality and when it was released.

I always average about 40 questions in my RFP's. Here are a few examples:

1. What is the average length of time, in calendar days, required to get your application into production?
2. Describe the abilities of your application to automatically escalate based on elapsed time or due date.

> **Tip:** If you are looking for an out of the box product that can be implemented quickly and with minimal customizations, be sure to identify that to the vendor. Mandate that answers to questions like #2 above should be from an out of the box mentality.

3. What is your company vision?
4. Please provide an overview of your financial history. (Get this information to your Finance Team, since they are the experts in evaluating a company's financial health.)



5. If you haven't done so already, please provide three references along with their contact information. The user references should be similar in size and industry to our organization.
6. Please provide a cost proposal for your call management system to be installed at our location. Our company will need X number of user licenses, along with user and system administrator training and implementation assistance to bring us live on your product.
7. Please list all other third party components our company will be responsible for to install your product; i.e. software licenses, servers, etc…

Now that you've created a quality RFP Document, pop on a cover sheet and send it to your short list of vendors. Give them a deadline to respond and be sure to include your contact information.

Onsite Demos, Reference Checks, Site Visits

At this stage, you should be down to the final three vendors - *hopefully*. During the RFP process, you invited all three to respond to your needs. Don't wait for the returned RFP's to get rolling on the next three critical steps of getting to know the vendors. Let the games begin.

Onsite Demos

Invite the vendors to present their product's features and functionality to a core team of individuals at your company. This could be the same audience from your kick-off meeting. The demo should be focused on the needs as defined in your Requirements Document. You should require only out-of-the-box functionality for this demo. The meeting should be scheduled for 3 hours. This will give the vendor 90 minutes to present with the rest of the time for additional questions (and hopefully answers). Also, let them know that you require someone who knows their application intimately, as you may have some technical gurus in the audience with pointed questions.

> **Tip:** I would not suggest letting the vendors know who the short list of competitors are. You want them showing you their product's capabilities. You don't want them leading with specific features they know their competitors lack.

Be sure to take diligent notes in order to summarize and compare against the competition later. Also, document every outstanding item that either you or the vendor committed to follow-up on and collaboratively assign a due date to it.

Reference Checks

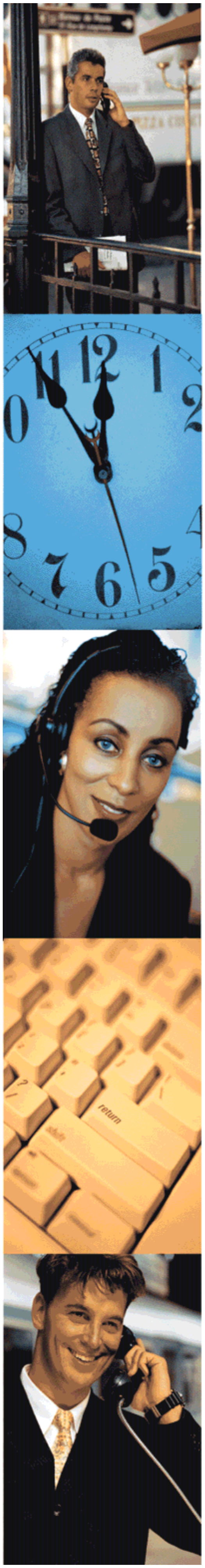
One of your RFP questions should have been, "If you haven't done so already, please provide three references along with their contact information. The references should be similar in size and industry to our organization". Let your vendor know that you would like those reference names and contact information as soon as possible. Three vendors times three reference checks each means you have at least nine people to connect with.

> **Tip:** Before making these information-gathering phone calls, be sure to have your questionnaire ready from your earlier networking phone calls. This will be critical in gathering complete and consistent information from each reference with only one phone call.

Site Visits

In addition to speaking to references on the phone, I always want to get out there to a live implementation, in as similar an environment to my operational infrastructure as possible. Ask each vendor to provide you with the names of a couple of clients that you can potentially visit. Call, introduce yourself, and set up a convenient time to meet. Bring along a couple of team members, including the person who will be the system administrator, if that decision has been reached. Let him or her see the application in use and chat with the technical guru at the reference site.

Selection, Negotiation, and Wrap-Up



Congratulations, if you perform all the due diligence steps outlined here, you will have a bucket-full of valuable information to aid in making an educated vendor selection. I've found that creating spreadsheets is a great way to compare functionality and cost. Don't forget to rate the vendor's responsiveness to your questions, no matter what they were. If they are slow to respond to your questions now, just think what their "sense of urgency" might be when you're a customer and need their help. I also like to give each of their 800 support lines a call and see what type of treatment I get.

The final negotiation and selection process will require additional communications with all three vendors, as you finalize every detail. If in doubt on anything from a vendor, get an answer, it will come back to bite you. At some point you will reduce the competition to the top two. It now gets a little easier to tally the pros and cons of each.

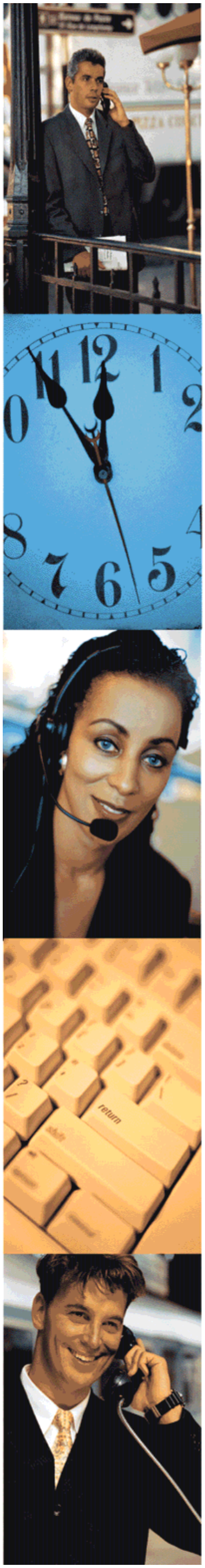
Finally, wrap up your research, along with all the supporting documentation, into a clear, concise document ready to be presented to your senior management team for approval.

Summary

As daunting as the process of selecting a Call Management System can seem, it is a lot easier when you break the process down into smaller, more manageable steps. Throughout this discussion, I have provided you with insights into how I have approached the process and found success across a number of companies, both as an employee and a consultant. These five steps should help pave the way for you:

- Identify a Project Manager & Create Project Plan
- Create a Requirements Document & Identify 12 Vendors
- The Request for Proposal (RFP) Process
- Onsite Demos, Reference Checks, Site Visits
- Selection, Negotiation, and Wrap Up

By following these steps, especially focusing on the planning, requirements, and research, you will find yourself well prepared for your presentations to senior management and, more importantly, ready to take on the next project – *implementing* the Call Management System.



About the Author

Bill Tobin is an Associate of Customer Centricity, Inc. He brings over 20 years of proven customer support leadership experience to his clients. He has specialized in creating help desk environments from the ground up, as well as improving operational efficiencies and effectiveness of existing support organizations. Bill's knowledge of support cultures ranges from large-scale corporations to high-tech start-up firms. Support teams created and lead by Bill are always focused on delivering a consistent and satisfying customer experience.

As an independent Customer Support Consultant, Bill's proven approach to operational improvements begins with a thorough assessment of an organization's people, process, and technologies. Once implemented, his recommendations have improved employee morale, increased customer satisfaction and reduced cost, based on streamlined processes and automated call management solutions.

More About Customer Centricity, Inc.

Customer Centricity, Inc., is a business consulting firm that works with companies to align their resources to exceed customer expectations in the most efficient and effective manner possible. We leverage our real-world experience to help our clients continuously improve their service delivery and management capabilities to:

- Increase profitability
- Improve customer satisfaction and retention
- Increase operational efficiencies
- Improve employee satisfaction

Customer Centricity optimizes the interaction between people, process and technology in several ways:

- Comprehensive assessment methodology to identify the actions that will yield our client's the greatest return
- Skills Training to enable customer-facing personnel to deliver exceptional levels of customer service
- Design and Implementation of business processes to serve the customer and manage corporate resources in efficient, effective and consistent manners
- Identification of the appropriate business processes to automate, enabling companies to get the most from their investments in technology

Customer Centricity's approach is to work closely with our clients to help them understand what they are doing right, and their opportunities for improvement. We provide pragmatic recommendations that provide immediate benefits, and we drive continuous improvement programs help our clients realize significant return on investment in a very short period of time (measured in weeks, not months or years).

To learn more about Customer Centricity: call: **603.491.7948** or visit our web-site: www.customercentricity.biz