Deploying End-to-End Small Call Center Software Solution

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Everyone knows running or starting a small call center can be a stressful time for any small business manager. If you've never been involved in a call center or contact center environment for any length of time, it can be even more difficult in getting your call center off the ground. You probably have key metrics which need to be measured against daily, weekly, monthly and yearly. Things like call response times, case resolution metrics, employee sales quotas and figures amongst many others are all important metrics to your contact center. We'll go into depth into the types of things that you need to know for your call center software needs to make sure you have the whole story before you make any purchasing decisions.

Covered will be key topics to look at while evaluating your call center software solution, key features that you may not know about, and ways to make sure your call center software solution comes in under budget, and on time. Choosing a call center software vendor is no easy task, and it requires a great amount of dedication and time investment, but at the end when your new contact center is up and running, by following the needs that you've set out for your Call Center software solution, you can experience true Return on Investment (ROI) and a much more efficient, well-oiled machine running in your call center environment. It's never easy, but this white paper should be used to lend a helping hand to solving your small call center software solution problems.

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1.0 Needs Analysis

Chances are, a 'Needs Analysis' is something that your potential Call Center software solution provider will go through with you during the pre-qualification stage (see below), however more often than not, they won't go near as in-depth as you need them to, and will try and talk you out of key features you may critically need, if they don't necessarily provide them. So doing an in-depth Needs Analysis prior to engaging in dialogue with any potential vendors is a critical step in getting your call center software solution off the ground. The factor which will have the biggest variable on what type of solution you need is the type of call center (or primary call center activity) that you're engaging in. We've done a very light look at some of the feature requirements, broken down by call center type. There are likely more needs for your call center that aren't covered below, so make sure you take those variables into account as well.

2.0 Inbound Sales/Service Orientated Call Center Software Environment

1. Call Monitoring software is extremely important here, as in an inbound environment, you're likely monitoring a lot of metrics for SLA measurement. Make sure your call center software covers all the bases of reporting against call logs and records.

2. If it's a priority to up-sell the callers into other products and services, then make sure it's a priority of yours to measure how your call center agents are performing. Make sure you have solid reporting and analytical functionality to stand on.

3. Sales! Breed a culture of selling and you'll find your revenues going up exponentially. Get great Sales Force Automation functionality, such as Lead Management, Sales Forecasting, Pipeline Management and Web based Contact Management to help your Sales Representatives close more deals and bring in more money.

3.0 Outbound Sales/Telemarketing/Telesales Software Environment

1. Lead Management is critical here. You're likely supplying the resources for your telesales staff to squeeze leads out of, and they need a way to manage them. You also need a system to make sure they're not going dormant, and to reassign leads to your top sellers. Make sure your SFA system includes great Lead Management support.

2. Pipeline Management and Revenue Forecasting software is also imperative to keep tabs on how your sales team is doing. Accurate sales pipeline management and sales forecasting are key parts of doing business in a telesales environment. The need to break down sales by team, organization or individual representative is also strong.

3. A solid foundation of reporting and analytics is also critical. The ability to drill down through all the data, from leads to logged calls, flowing through the system in order to pinpoint inaccuracies is huge. Make sure you have multi-tiered drill down capabilities in a customizable reporting and analytics environment.

4.0 Technical Support/Post-Sales Customer Service Contact Center Software Environment

1. Case Management and Ticket Management software is the most important part of this type of call center environment. Make sure that the ticket management system takes care of all avenues of trouble ticket submission - phone, email, web based and manual entry. Also having a good set of ticket or case routing rules is crucial in ensuring no customer inquiries are left unanswered.

2. Web based Contact Management software is also critical to ensure a great customer experience in your post-sales Service & Support call center. Make sure you have up to date contacts in the system, easy and efficient ways to create or edit contacts in the system, and a great reporting method to purge duplicates out of the system.

3. Reporting and Analytics is also important to make sure that you can measure up against expected values set out in any SLA's you may have to adhere to. Make sure you can drill down into the data to get those key metrics out of the system quickly and easily. Being able to save custom queries for daily, weekly and monthly reports is a great added bonus.

5.0 Vendor Pre-Qualification

Once you've combed through the above and identified which ones are most applicable to you, you can move on to pre-qualifying vendors. Depending on the size of your call center, you may wish to develop a RFP (Request for Proposal) calling on vendors to submit proposals based on your needs assessment that you already completed. Or in a smaller environment, you may simply wish to submit a template email to all vendors who you can pre-qualify based on what you can find on their web sites asking for more information on specific features, and demonstrations of their software in action, or free trials if available. This process could take awhile, but it will eventually yield a small number of vendors who have call center software products that are related to what you're looking for. You should optimally narrow down the field to two or three key contact center software providers, so you can have an easy view of what's necessary to continue. Make sure all of the vendors you pre-qualify are aware of any budgetary constraints you're working under, so that you know if they fit what you're looking for. Once you have your list in hand, get to know your personal account representative within the vendor's organization as you'll need to work closely with them through the future in order to finalize what contact center software vendor you'll be working with. Next, we'll move on to putting your Call Center Software Solution provider through the paces to make the final choice.

6.0 Identifying the Perfect Call Center Software Provider

The next phase requires even more time and focus than the last - rigorous and thorough testing. Any vendor that has a serious solution available should allow you to 'try before you buy' its Contact Center Software product, so you know exactly what to expect before you get involved. If a Call Center Software solution provider doesn't allow you to see their product before you buy it - be very wary of the solution as well as the company. In today's Call Center Software market, any Contact Center Software provider should offer a 'free trial' of some sort, regardless of if it is hosted Call Center Software or installed software for Call Centers. For this phase you may also require the close assistance of one of the Call Center Software solution provider's sales representatives in order to demonstrate how to achieve the particular functionality that you're looking for in the Call Center Software solution. No two Call Center Software solutions are the same, so you may not automatically be directed to where you think the functionality is located at. Make sure you take extensive notes on the Contact Center Software system's capabilities, short comings, ease of use, logic used in its layout, and any system problems you encountered. Each Call Center system provider should take no less than a week of rigorous testing (the more stringent your needs, the more time is required to adequately test the software system) before you move on to the next one. Expect to learn more about call center software than you ever thought possible during this time period. Thorough evaluation of each product should involve rigorous testing of each main function you're seeking. If you're primarily looking for Web based Contact Management software, then make sure you've input all sorts of data from many different angles of the Web based Contact Management feature in the system. Try accounting for user error (such as data in incorrect fields), any global characters you may require support for (Spanish, Japanese, Arabic character sets, etc) and make sure that any mistakes that are made in data entry are easily identifiable and correctable. Make sure that the Web based Contact Management tab contains data fields for all the specific types of data you're looking to store, and if it doesn't, it has a sufficient customization ability to store that data for you. Lastly, make sure your Web based Contact Management feature ties into all other features and links back contact history from tasks, events, logged phone calls, emails, and any other type of correspondence you're trying to keep track of. Use that sort of practice to make sure all the important features work from top to bottom for your organization until you're comfortable not only using it yourself, but also would be comfortable explaining how and why it needs to be used to the various types of employees in your organization who will be utilizing that particular feature. Part of the difficulty in CRM implementations is understanding and explaining why CRM is important, not only getting it installed and used. Make sure that you walk away from each Call Center Software vendor with a clear understanding of why each particular feature functions as it does and you'll likely find that the learning curve for finding out the how in each feature is quite fast.

Once you complete the evaluation of each vendor's Contact Center CRM software system, compare your notes. If anything wasn't answered sufficiently, get clarification from your representative at each company. Make sure everything has been explored and if it is still not clear which provider best suits your company now and into the future, narrow down your choices into the top two or three, and have other representatives in your company use them as well and give you feedback. This should finally give you the top Call Center Software provider in terms of functionality and usability.

7.0 Final Thoughts on Deploying Your Call Center Software Solution

- There are lots of vendors out there who promise you the world and fail to deliver - don't get disheartened in your quest for the perfect Call Center Software Solution. Just keep at it and you'll find the one you need to succeed.

- If your budget isn't quite up to what is needed to fulfill your call center software needs, try test deployments in small segments or teams to see what kind of Return on Investment (ROI) is offered. If it pays for itself in 12 months with a team of 10 employees, think about what it could do in 12 months for your entire call center!

- You can also try to work the price down some by agreeing to supply positive customer testimonials to the provider, allowing the provider to conduct periodic case studies and use you as a client reference. You could also try exchanging products/services, if you're a business to business (B2B) orientated provider. All software vendors like receiving good reviews from clients.

- Keep in mind the concept of small business CRM is mostly corporate strategy, and very little software component. You've already taken the first step in becoming more customer centric and automated by reading this white paper and trying different solution providers, but make sure you have started to breed the kind of corporate culture to play into what your call center software solution is designed to do - be it more customer service orientated, or sales orientated

- Don't forget to factor in your 2, 5 and 10 year growth predictions when picking a call center software provider. Are they sufficiently scalable for your needs in that time frame? If not, and you're only seeking a temporary solution, how easy is it to get your data out and into another system which will accommodate your needs into the future?

- Training is paramount. Make it mission critical to get all your representatives familiar with the system before its deployed, because most of the value behind the success of your CRM implementation will come from employee adoption. If any are left behind, or still stuck using an older method, you'll never experience the true ROI your solution is capable of.

No matter when you're looking to deploy your solution, or what you're looking to do with it, there is a solution provider out there that has all the tools you need to succeed with your call center. Don't hesitate to contact any of them for more details - it's only a few minutes of your time for information which could save you enormous sums of wasted money.

8.0 Contact Us

Salesboom.com

sales@salesboom.com

617-600-7989

9.0 More Information

For more information regarding our products and services please visit our site at:

http://www.salesboom.com