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If you’re looking into a contact center platform for the first time, selecting, implementing, and optimizing a solution for performance probably feels a bit overwhelming. With so many platforms to consider, the ultimate challenge is simply finding the one that best meets your specific business needs.

There’s little debate that customer service is one of the most important functions within your business. **The right technology to manage these interactions is essential.**

The right contact center platform will provide the functionality, tools, and foundation for your team to execute exceptional customer service and easily accommodate any future growth. Customization, flexibility and scalability are key.

Before you begin your search for a vendor, create a broad list of your overall needs. Spend some time considering the following questions:

- What’s the ideal deployment option for functionality and growth?
- What key functionalities do you need initially and in the future?
- How many and what types of licenses will you ultimately need?
- What tools are needed to monitor and measure ongoing performance?

This eBook will help you define what a contact center is, decide if you need a contact center platform, understand the architecture of and core components of most contact center environments, and then identify the next steps in finding the best platform for you.
What is contact center platform technology?

A contact center platform is software designed to give organizations the ability to effectively manage and route all inbound and outbound customer support communications.

The main function of contact center software is to provide companies with advanced tools and features that systematize customer interactions and organize customer and business data.

To meet the demands of today’s on-the-go customers, businesses should consider software that allows them to communicate across several channels – voice, web chat, email, SMS, social media, etc.

There are two ways to achieve this. One option is to use individual (separate) vendors that specialize in providing a certain service (e.g., one vendor for email and live chat, another for standard voice, another for SMS).

The second option is an all-in-one (or omni-channel) platform that unifies all communication channels into one interface. This option has many benefits - consolidated vendors, integrated data and the ability to introduce new channels - or remove them - quickly and easily.

Let’s take a look at how to determine whether or not you need a contact center platform.
Do I need a contact center platform?

As a general rule of thumb, any company that offers products and/or services to other businesses or consumers needs some kind of platform to coordinate customer interactions and data.

Why? Because without it, it’s impossible to effectively organize, respond to and follow-up on customer support requests.

In fact, many companies that you wouldn’t necessarily associate with having a “contact center” actually use contact center software to manage their day to day business. For example:

- Retail clothing brands *(e.g. adidas)*
- Consumer packaged goods companies *(e.g. Procter & Gamble)*
- Multinational financial services companies *(e.g American Express)*
- Outbound telemarketing services
- Government-run facilities *(e.g. law enforcement agencies or postal service)*
- Local consumer-facing businesses with significant inbound customer support inquiries *(e.g. veterinary hospital)*
- Non-profit institutions *(e.g. colleges)*
- Local and multinational service-oriented companies *(e.g. onPeak or Uber)*

Unless you’re operating in a very obscure niche with fewer than a dozen or so employees and have very few customers (with very little inbound customer support inquiries)...chances are you will eventually need a contact center platform.

**Consider this:** The majority today’s cloud contact center software will scale as your operation grows. So, you can start with a few licenses and add more as you grow. You don’t have to have a huge operation to reap the benefits of implementing contact center software.
Where should I start researching contact center platforms?

Here are a few ways to begin researching contact center platforms:

1. Look at software review websites

Popular software review sites allow you to familiarize yourself with some of the options out there, and narrow down your search. Some of the most popular places to take a look at contact center platforms include:

- Capterra
- GetApp
- Software Advice
- G2 Crowd

2. Follow industry analysts

Keep up with the latest industry trends by following or connecting with recognized industry analysts. These experts have their finger on the pulse of the industry from both the customer and vendor perspective:

- Donna Fluss [@dfluss]
- Ian Jacobs [@iangjacobs]
- Nancy Jamison [@nancyjami]
- Irwin Lazar [@imlazar]
- Kate Leggett [@kateleggtn]
- Sheila McGee-Smith [@mcgeesmith]
- Blair Pleasant [@blairplez]
- Paul Stockford [@paulstockford]
3. Ask your business contacts about their experiences

The best insight often comes from individuals who have evaluated, purchased and currently use contact center software. You can get feedback on what they like, don’t like and features they wish they had in their current contact center platform.

As you research, it’s important to keep your main objectives in mind in order to create a list of “must-haves” and “nice-to-haves.”

For instance, why do you need a contact center solution? This will help narrow your focus on the functionalities you need.

What features does your perfect contact center platform have? Things like ease-of-use, efficiency, and simplicity of integrations may be an area of focus.

What “extras” would be beneficial to your business? Reporting, analytics, and built-in coaching functionality could be important to focus on.

How can you better support your customers? Choosing a system which will allow you to stay customer-focused, organized and efficient should be top-of-mind.

Once you have a firm understanding of what you want and need, you’ll want to compare that list to the features of various contact center platforms.

Let’s take a brief look at some of the main features available in most contact center platforms.
What are the requirements and features needed for a contact center?

Main features in most contact centers

Each contact center environment is different from the next. People, processes, and technology differ from company to company, so while there is no definitive checklist of features and functions, there are several key components that every contact center platform will have.

These core pieces help to create the nucleus of most systems:

**IVR.** Interactive voice response mechanisms help identify customers’ reasons for calling. They are essentially automated systems to get the customer routed to the group of agents or self-service options that can best serve them. IVRs improve efficiency by reducing transfers and allow customers to access account information, and enable automated changes or payments.

**ACD.** Automatic call distributors help increase productivity of your team by assigning incoming calls to agents. An advanced algorithm ensures that calls are distributed to the agent best skilled for a particular interaction (skills-based routing).

**CTI.** Computer telephony integration is a blanket term that refers to the ability to connect a telephone system with a desktop computer or server so agents can use a softphone and see caller information on screen.

**CRM Integration.** Integrating with existing applications like a CRM [customer relationship management] system is one of the most important capabilities your contact center platform will need. It provides agents with cross-departmental data to better understand a customer’s past interactions with a company. Additionally, when agents take notes and document the results of their interactions with customers, this information will be recorded so the next time the customer reaches out, the responding agent can provide a better experience.

**Call Recording.** Many customer service departments have a need to record calls between agent and customer in case there’s any questions later about what happened during an interaction, as well as for training purposes. Most contact center platforms also enable recordings or transcriptions of other forms of communications like email, SMS, and web chat for record keeping.
Analytics and Reporting. Real-time and historical reporting helps contact center managers gauge success and efficiency of their contact center operation. While the presentation and scope of available data will differ from vendor to vendor, contact center platforms generally enable some form of data extraction. Managers can access raw data, charts, graphs, and can often generate custom reports from personalized dashboards. They can then use the insight(s) they gain to help measure success and know what areas need optimized.

Service Channels. Most customer contact centers can support numerous service channels. These commonly cover phone, text (SMS/MMS), email, web chat, voicemail, callbacks, screen sharing, and may include new, innovative capabilities across social media, live video, virtual assistants (chatbots), mobile apps, and others. It’s most important to approach your channel strategy with a “customer-first” mindset. Which channels do your customers prefer? That’s where you need to be. For some businesses, voice might be the only channel needed. Others may well need to support upwards of half-a-dozen channels.
Quick tip: Be customer-focused instead of thinking “channel first”

The purpose of any contact center is to support customer communications across multiple channels in the way that best suits each customer.

While it may be tempting to start arbitrarily hand-picking features that you think you need in your contact center, it’s important to stay customer-focused during the discovery, research, and implementation process.

That means making mindful, informed decisions about which channels to prioritize.

The best solutions will allow for complete customization and will help match your contact center technology with your customer service goals. When investing in your future, finding the right technology to help you reach your customer service metrics and KPIs matters.

The extent to which you can customize and scale is largely dependent on how your specific contact center platform was built – in other words, its architecture.
What kind of architecture should my call center have?

The most common deployment options for today’s active contact centers include on-premises, hosted, and “cloud.”

But as most progressive, future-thinking organizations are beginning to realize, the move to the cloud is the only option to realize a complete customer service strategy now and in the future.

Today, “cloud” (as an umbrella term) has become the most common deployment option.

“As the contact center industry grows, so too do the technological and management demands of the industry. Small contact centers that are largely still run by old-fashioned manual methods are ripe for the efficiencies that modern contact center solutions can offer.” — Tracey E. Schelmetic

And the number keeps growing. Recent research from Markets and Markets indicate the cloud contact center industry will be worth $10.9 billion by 2019. Gartner says by 2019 about 2/3 of contact center platforms will live in the “cloud.”

A subset of “cloud,” a cloud-native, microservices-based architecture is the most scalable and robust option to truly address the needs of the present and future.
Cloud-native deployments don’t require hardware and are globally scalable.

They are redundant – leveraging data that automatically replicates across multiple data centers – and therefore enable users to access the platform at any time, from anywhere in the world, so long as they have internet access.

MONOLITHIC
If one fails, they all fail.

MICROSERVICES
If one fails, it’s replaced with another.

As opposed to a “monolithic” architecture, a microservices architecture makes it incredibly unlikely that all components of your contact center platform will fail together.

On-premises and hosted models – often referred to as “legacy” deployments – are quickly becoming outdated due to their limited capacity to grow with your organization’s needs.

Cloud-native is the way of the future.
Wrap-Up

Implementing a contact center platform can feel intimidating and overwhelming – and it can be. After all, your customer service team will be working in this software all day, every day.

Your contact center platform is more than a mere “tool” to serve a momentary need. It’s really a platform that’ll serve as the foundation for your team to create amazing experiences for your customers.

As Donna Fluss, President of DMG Consulting says,

“There’s a plethora of sophisticated call center technology available to operate a call center. The challenge is to select the right technology, implement it properly, and then optimize performance on a day-to-day basis.”

As an recap, here’s what you should be thinking about and asking before choosing and implementing a contact center platform:

Basic questions
- Are you looking into your first call center, or upgrading to something new?
- How many customer service inquiries does your company deal with?
  - What communication channels do your customers use most frequently now?
  - What additional channels do they seem to be interested in [future]?
- How do customers feel about your current service offerings [channels/quality]?
  - What limitations/obstacles are currently getting in the way of great customer service?
  - How do you learn whether your customers are truly satisfied?
- Are you considering implementing a contact center platform to meet customer needs or to satisfy competitive needs?
Advanced considerations

- Who can I connect with to learn contact center platform best practices and absorb industry insights and recommendations?
  - What will it take to remain competitive in our industry?
- What kinds of customer data do you need to capture, keep, and use (e.g., best phone numbers, best times to contact, permission to send SMS messages, frequency of contact, history of issues)?
- Do you ever need to “ramp up” operations during higher volume periods?
- Would a future-proof, cloud-native contact center put you in the best position to meet the current and future needs of your customers?

Take your time in evaluating the purpose of your contact center and how it should function, as well as understanding all of the options available.

Choosing and operating your contact center isn’t a race. It’s a well-worth-it marathon that you’ll win as long as you continue pushing toward the finish line with your sights set on one thing and one thing only: the needs of your customer.

Want to learn more about Sharpen’s Contact Center Platform? Let’s chat - contact us.