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# Connections

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MAGAZINE

Contract

## CREATING CONTRACTS OVER THE TELEPHONE

signed by the Vendor, hereby  
I, the Vendor, hereby agree to perform and execute all obligations of the Vendor. The Vendor shall not be held  
liable for any claims resulting from any action or inaction (including  
negligence) of the Vendor.  
The Vendor shall be paid under the contract.  
The contract shall remain unmodified.

DATE \_\_\_\_\_

DATE \_\_\_\_\_

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# Ten Key Elements of Your Next Contact Center CRM Solution

By Cesar Vallejo

**P**urchasing technology for the contact center can be overwhelming – companies must wade through a variety of vendors, solutions, and options to find the right fit. Here are ten key questions to ask to ensure that a solution will be powerful, cost-effective, and able to grow with your contact center.

## 1) Is it cloud-based?

Just because contact centers use electricity doesn't mean they need to build a power plant. And with cloud computing, contact centers no longer need to build out expensive IT infrastructure and install applications to manage their CRM. Cloud-based CRM solutions are inexpensive, flexible, and loaded with features. They require less maintenance and virtually no infrastructure. Cloud applications are browser and platform agnostic, allowing users to operate from thin clients, PCs, Macs, tablets, and smart phones from any Internet-enabled location. Remote workers? Not a problem. Home-based agents? Absolutely! Even contact centers that cannot deploy on the public cloud don't have to be stuck with 1980s license-software technology. Look for a solution that offers private or hybrid cloud capabilities.

## 2) Does it easily scale?

Unlike assets that increase in value, IT infrastructure will always become obsolete. Companies should own as little IT infrastructure as operationally possible, and the same is true of installed software solutions. Look for CRM solutions that are available on demand and able to scale up or down as needed quickly. Most cloud-based CRM solutions offer this flexibility, but it is an important contractual issue when engaging with a provider.

## 3) Does it integrate?

It is a rare contact center that can work as an island. CRM software needs to connect to multiple other applications, systems, and databases. Contact centers that run an insulated paradise can move on to the next topic; for everyone else, it is critical that a CRM system integrates and exchanges data with corporate ERP, manufacturing, or marketing systems, and – in the case of outsourced contact centers – with clients' systems. This is one of the key differentiators for many CRM software providers. While in principle all cloud-based software solutions are designed on a service-oriented architecture (SOA) and

*(Continued on page 18)*

## Ten Key Elements

(Continued from page 17)

will easily integrate with other software, not all providers follow this business strategy. Some limit integration access in order to lock the customer into their environment, and others use a one-size-fits-all strategy that discourages integration. Make sure the provider you choose has designed its product with ease of integration in mind and has a professional services organization that can effectively carry out the integration process.

### 4) Can workflows be configured and re-configured easily?

Today's dynamic organizations undergo constant change. They create new revenue streams and product lines, enhance business practices, and comply with myriad laws and client requests. Each change requires new and optimized business processes. Look for a CRM solution with drag-and-drop functionality to create or update business processes and workflows across all channels quickly and easily without IT intervention or costly customization.

### 5) Is it multi-channel?

There is a reason that "call centers" are now becoming "contact centers": Customers increasingly prefer to communicate using multiple channels, including phone, email, Web-based chat, text, Web forms, and a whole variety of social media channels such as Facebook and Twitter. Contact center CRM

solutions need to accommodate multiple channels to both receive and respond to requests while still offering a single view of the client.

### 6) Does it allow agents to easily collaborate?

CRM solutions should incorporate *applied social* techniques such as wikis, walls, and tribal knowledge bases that enable employees to work together to solve clients' issues faster and more efficiently. Solutions should also allow users to "friend" more than just people – they should "friend" data. Managers should be able to "follow" employees, specific clients, products, or issues so that important information on every interaction will be pushed to their attention. The early results of applied social techniques are in, and the effect on KPIs is dramatic. This key differentiator will propel some customer service organizations far ahead of their competitors while causing others to go out of business.

### 7) Does it include self-service functionality?

We live in an era of self-service. We happily pump gas, do bank transactions, and book flights because it saves time and allows us to customize for particular circumstances. The same is true for contact center customers: they need a solution that enables them to resolve their own issues on their own time. But more importantly, a technology-enabled self-service solution can improve one of key challenges of today's contact center: employee engagement. By moving routine problem

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resolution from the CSR to the customer, companies can use their expensive and talented CSRs to resolve the issues that truly require personal intervention. CSRs don't like reading scripts and providing formulaic answers all day long. By enabling customers to resolve their own routine and repetitive issues, contact centers can engage CSRs in more meaningful and challenging work.

### 8) Does it enable easy data segmentation?

Today's contact center is a hub of business activity, touching multiple business units and even multiple clients. While some business processes and databases can be shared among these various groups, most contact centers have complex data management needs that require segmentation. A CRM system must offer an easy-to-use data segmentation functionality to create multiple partitions and views of data by individual clients, business units, or entities. Look for robust data segmentation that enables contact centers to create customized workflows, business processes, and nomenclature for each entity without expensive programming.

### 9) Does it verify entitlements?

Not every client is created equal and, in the real world, not every caller is entitled to the same services. Contact centers are transitioning from cost centers into profit centers, and providing CSRs with accurate information about customer entitlements (such as valid warranties, extended service agreements, and specific details regarding what is covered under each client's contract) is critical. A CRM solution should have the flexibility to manage the full life cycle of contracts – including asset-based and product-class-based contracts – as well as support multi-tiered warranties. It also should support multiple drawdown types to enable CSRs to track, for example, the balance of a customer's pre-paid service account and provide opportunities for renewal, upsell, and cross-sell. These functionalities need to integrate tightly with existing operations for seamless application of entitlements, including SLAs, billing terms, and coverage plans.

### 10) Can it dispatch?

Finally, sometimes it's necessary to dispatch someone to the client's location. For these on-site issues, the CRM solution should be tightly integrated with field support, field service, scheduling, and dispatch software. In today's world, the phrase "someone will contact you later for scheduling" is unacceptable and frustrating to clients, as well as unproductive and ineffective for the company. ☐

*Cesar Vallejo is VP of strategic alliances for Vertical Solutions, Inc. (VSI), a developer of cloud-based CRM/contact center and service management solutions. He came to VSI from Gartner Inc., bringing more than twenty years of experience in the analysis and implementation of large enterprise systems. For more information or to contact him, visit [www.VertSol.com](http://www.VertSol.com).*

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