



Embracing Change Head-On:  
The Advantages of Cloud-Based  
Contact Center Software Solutions

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## I. Introduction

In the contact center business, change is constant. New client? Great. New program or product? Exciting! New selling process for your agents to learn? Challenging, but often essential. But for small businesses and large enterprises alike, efforts to outsource agents, expand to new geographies or open new contact center can represent daunting change, putting a real strain on both people and technology—especially technology. Why is this true?

Let's face it: contact center systems are complex. They support a wide range of business and communication functions, and depend on multiple technology layers. Applications and tools, often sourced from multiple vendors over different time frames, may not play well together, resulting in inefficient, cumbersome overlaps and gaps in functionality.

All this complexity and dis-integration can turn even a simple change—a new product, a new campaign, a new SLA—into a lengthy, expensive proposition, requiring more time, money and staff than most organizations (and the IT teams that support them) have available. And the bigger challenges—scaling up quickly, deploying new contact centers, moving to blended agents—can seem impossible to overcome. So how can contact centers stay competitive, capture market opportunities, and scale operations rapidly when the need arises?

For many organizations, moving to integrated, cloud-based contact center technology has worked well, enabling the rapid change demanded in today's dynamic environment while eliminating the high costs and hassles of maintaining complex internal systems. These virtual contact centers repeatedly cite the advantage of rapid scaling, enabled by the large pools of shared resources in the cloud, as a key benefit—and there are many others.

In this report, we'll examine the strategy of migrating from premises- to cloud-based contact center software solutions—why it makes sense for some organizations, what to consider, and how a few real-world migration efforts have fared. Does this strategy make sense for your organization? Let's find out.

## II. Why Move To The Cloud?

Today's contact centers face challenges common to many service-oriented businesses: revenues must go up, quality must rise, and everything has to happen faster—while costs are kept in check. Despite those challenges, contact centers must also meet the demands of ever-stricter service level agreement (SLA) requirements.

Quality means happy, loyal customers—but today's customers are demanding more types of service, delivered more quickly, and with the expectation that agents will proactively help them get precisely what they want (or need). Yes, agents can pull this off—if they have ready access to transaction

history and other relevant customer information. Any delay, any error, any inaccuracy in that information can send the customer experience—and future loyalty—into a tailspin.

Not surprisingly, making all this happen requires a number of technologies and applications to work together flawlessly. Automatic call distributors (ACD), automatic dialers, and interactive voice response (IVR) systems must all work seamlessly. Workforce management (WFM) keeps staffing levels and costs in sync, and (in most cases) it all has to be linked with sales automation and/or customer relationship management (CRM) solutions. It's also not uncommon for organizations to need custom-developed additions to these systems—and that means even more complexity, along with higher costs whenever change comes along.

Maintaining all of this—together with responding to the inevitable requests for new reports, analysis queries and other one-off projects—keeps internal IT groups fully occupied. When a new product line, promotion, client, SLA, sales process comes along—or when one of the technology components introduces an upgrade—the resulting projects can take months and swallow up significant resources. And that translates to missed opportunities, reduced service levels, and, frequently, skyrocketing costs. For large enterprises and small, this maintenance nightmare has been extremely prohibitive to defining and building the optimal customer experience.

## **Can the Cloud Help?**

Cloud-based contact center software—offering all the tools and functionality a contact center is likely to need, fully integrated and available on-demand, and without the need for hardware and software—virtually erases these problems.

First, because they must support a community of customers with constantly evolving needs, cloud-based solutions tend to be comprehensive, with state-of-the-industry functionality, fully capable of supporting leading-edge best practices. For the same reason, they're typically extremely easy to use. And their large installations can also scale up or down much more rapidly, enabling individual contact centers to continuously match both resources and costs to their needs—even when those needs extend to multiple locations worldwide.

Cloud-based contact center software frequently offers proven, pre-built links to popular CRM, sales force automation and other software solutions. Agents can begin taking advantage of greater customer intelligence rapidly instead of waiting while contact center IT teams re-invent integrations. Also, because these software solutions are mature, up-to-date and administrator-friendly, new processes and other changes can be implemented in a matter of minutes or hours instead of weeks or months.

By eliminating the delays associated with internally managed systems, contact centers can cost-effectively add functionality, boost capacity, change processes and tap new or changed data sources precisely when they need to. A business can deploy agents or even establish new contact centers with unprecedented speed, on a pay-as-you-go basis that benefits

## State of the Call Center Industry

### Greatest pressure on contact center managers:

Increasing customer demand.

### Top driver for cloud adoption:

Skyrocketing IT infrastructure costs.

—Aberdeen Group, *The Business Value of a Cloud-Based Contact Center*, June 2011

businesses of all sizes. The result? Maximum agent productivity at all times, lower costs, and the ability to seize market opportunities that might otherwise have been lost.

Because cloud-based contact center software can be launched rapidly and is highly usable, it's ideal for organizations ready to offload on-premise software solutions, as well as those wanting to create new revenue streams by transforming or adding full-service contact centers.

### The Cost Advantage

Hardware and software investments are minimal if needed at all. No up-front capital investment is required, and ongoing monthly expenses are much easier to forecast. Integration with in-house systems is simplified by application programming interfaces (APIs). Once implemented, Cloud-based solutions are easy to administer, usually requiring less involvement from scarce IT resources, who can stay focused on core business issues instead.

## III. Preparing for the Cloud

While a cloud-based contact center software solution can speed time-to-market while eliminating infrastructure and resource problems, getting your organization ready is crucial for success. Here's where to focus:

- **Get—and keep—buy-in.**

Gaining the support of executives, operational managers and the agents themselves is critical. It's best to solicit input from all the relevant subject matter experts: contact center managers, agents, IT professionals, and other functional areas that might be affected, such as product management or distribution. Listen, pay attention, and respond to concerns—in most cases, they're real.

**Don't forget training.** Since cloud-based contact center solutions are easy-to-use, people sometimes skip training and plan to click their way through a new solution—only to encounter (or cause) problems later. So use training as part of the buy-in process: to ensure self-sufficiency later, let users help define how they will work with the solution, then incorporate those concepts into training. Keep IT involved so that the solution can be configured optimally. Many companies find that end-users contribute highly innovative recommendations—that can be implemented from the beginning—during this training period.

- **Know your business processes.**

With technology no longer an obstacle, business processes take center stage. How will more comprehensive, more adaptable capabilities and tools affect daily business? Lay out ahead of time what will change at each touch point (and whether there will be new touch points as well). Document all of it. Also, analyze how greater ease of integration with IVR, CRM, and other back-office applications might change your processes, so you can take advantage of improved

customer intelligence (the other applications can likely benefit, too, as agents may be able to more easily capture information that can be passed on to them). Mapping out business processes in this way can go surprisingly quickly, and it gets everyone involved focused on delivering the right customer experience.

Finally, don't ignore opportunities to streamline your processes. The act of understanding and documenting will almost certainly reveal steps that can be skipped, combined, or performed in a more efficient way.

#### ■ **Metrics and Measurements**

It is a good idea to measure existing processes—through the capture of specific metrics—and establish goals for their improvement, before you make the move to the cloud.

Next, describe what you think success will look like (this will help you establish and retain executive buy-in). Be specific! You may want to improve time-to-contact by 10 percent... boost revenues by \$300K per quarter... or show specific progress on other key performance indicators (KPIs). The clearer you can be now, the easier it will be to measure the results—and the level of success—associated with your move to the cloud.

## IV. Selecting a Cloud-based Software Solution

You've got the buy-in, and you understand your business processes; now it's time find the solution that best fits your needs. Start by becoming as informed as possible about the solutions on the market. Use all the research tools available to you including the Internet, associations, peers, and industry analysts.

As you flesh out your list of candidates, look beyond the technology—you'll want a provider with demonstrated expertise in contact center best practices and implementations, and one who actively seeks an understanding of your business requirements.

Speaking of business requirements: be careful not to let a compelling sales presentation or snappy functionality overshadow the work you've already done. Do the work of matching the business cases you've documented to the solutions, and develop a short list of the promising ones. These solutions should fit your organizational needs, not the other way around.

One thing to watch for: sometimes an existing process, or the way systems are used to execute it, is overly complex because premise-based contact center technology was missing a capability. Cloud-based solutions, with their state-of-the-industry functionality, may have the capabilities you were missing, and you can achieve your goals with a simpler process (or eliminate one altogether). Put another way, a fully integrated, cloud-based solution may—and possibly should—cause you to re-think some processes. Thus, what may look like a missing piece is actually an opportunity to simplify, streamline or otherwise improve.

## Understanding your business processes: steps to take

- List all contact center processes.
- For each process, map out all touch points, including what customers and agents experience at each touch point.
- Review for opportunities to improve efficiency, the customer experience, sales results (when applicable.)
- Now, step back and summarize the process. Is every step needed? Can new information accelerate things?
- Document every point of integration with other systems—this is critical.
- After you've gone through every process, document workflow for larger, combined processes—Large Problem Resolution, or Multi-Location Sale— from initial contact to resolution.

## Final Choice

After narrowing your list and identifying a front-runner, present your more complicated business scenarios and ask for a pilot project—then use the pilot to test all the functionality that's important to you. In the course of the pilot, look for a functionality match as well as opportunities to streamline processes or improve results—you'll want both, so your move to the cloud can help take your contact center business to the next level.

## Handling Objections During the Selection Process

When concerns arise in your organization about moving contact center technology to the cloud... welcome them. Addressing them will help you learn more—about the solution and about gaining buy-in from your stakeholders. An easy way to anticipate these five most common cloud initiative objections: incorporate them into your selection criteria.

- **Security**

Every move, in any direction, involves risk—so risk assessment should be part of your selection process. No one will be taken by surprise: security, reliability, and regulation are facts of life for cloud vendors.

- **Scale**

Any cloud solution should have scalability as a fundamental design element—it's one of the primary drivers for making the move.

- **Functionality**

The point of moving to the cloud is to have more flexibility, not less—but, without close examination, any “packaged” solution can appear to be limiting. This is where your process and functionality study will be critical. Don't accept broad statements about this risk: look for responses with detailed examples of how you've matched use cases to technology.

Of course, you likely will have ruled out any solution that doesn't include, at a minimum, ACD, IVR, Dialer, WFM and customizable reporting.

- **Integration**

Linking seamlessly with CRM and other applications is crucial, so ease of integration is a legitimate concern for everyone. Contact center solutions should include a robust set of pre-configured, ready-to-use integrations for use with popular CRM solutions. A viable cloud-based contact center solution will also provide clear, open APIs and connectors for linking with other applications.

- **Customization**

Every user community thinks it needs a custom approach, never before required. While this is often the situation with an organization's core functionality, contact center requirements—and the way technologies meet them—tend to be more standardized. When a customized approach is championed, work to understand

the underlying business process—then see if the target solution supports that process effectively. The functionality may look different—and that might not be a bad thing.

To be proactive, identify your most complicated use cases and check for out-of-the-box functionality that will support them. A reasonable solution—one with integration capabilities, and full-featured APIs—will let you link it with any exotic statistical or reporting needs your organization might have. You'll need patience to show internal doubters how their needs will be met—possibly in a new and better way.

## V. Implementation Considerations

Unlike many on-premise software projects, implementing a cloud-based contact center software solution can be quick—almost too quick if you're not prepared. Don't skip the steps discussed earlier—then make sure these bases are covered, too:

- **Designate a project manager.**

While it's true that many in your organization will want to function well as a team during the project, too many opinions can spell trouble—so appoint a single individual who will spearhead the project. The ideal project manager understands both the technology and the business requirements that will drive it. Who sets timelines, phases the work, oversees deployment efforts and acts as primary contact with the vendor? The project manager—of course.

- **Identify an administrator.**

On an ongoing basis, you'll need to manage your solution's configuration—so name a primary and backup resource early on, so they can get up to speed and even help refine requirements.

- **Work closely with the vendor.**

Fortunately, you already identified a vendor with plenty of experience implementing cloud-based contact center solutions. Now make sure that vendor assigns the right resource to your project. Insist on an individual with deep expertise in the solution and broad knowledge of contact center business processes. Then, plan to work very closely with that individual, through configuration, testing, implementation, and in the early weeks thereafter.

**Making homes smarter,  
one contact center  
agent a time.**

**vivint.**

Vivint, Inc. is one of the largest home automation companies in North America. Vivint delivers award-winning customer service and smart technology.

**Employees:**

5,000

**Customers:**

500,000

**Contact center Agents:**

125+

**Situation:**

- Exponential business growth
- Escalating license costs for on-premise contact center systems
- Lack of reporting
- Difficulty with scaling and long-term growth

**Solution:**

Five9 Virtual Call Center

**Lessons Learned:**

- Quick implementation meant not enough end-user training
- Align business and technical needs
- Fully Understand the Power of the System

**Benefits Gained:**

- Continuing to grow rapidly while implementing new processes
- Ability to scale with flexible deployments
- Upgrades deliver best practices immediately

## VI. Summary

Inflexible, complex contact center technology can dramatically impede your organization's ability to support day-to-day operations and expand its business—and maintaining an on-premise software solution can be both costly to maintain and limiting. Cloud-based contact center solutions offer a low-cost, quick-to-implement alternative—deliver the flexibility needed to enable growth and expansion.

To bring these benefits to your organization, begin setting the stage now, and find a vendor that knows cloud technology, contact center applications—and the contact center business. And it won't hurt if that provider demonstrates a profound commitment to strong partnerships and unrivaled service.

Then do your homework. Get stakeholder buy-in. Embrace change by understanding the technology's potential impact and taking advantage of its power. Look for opportunities to leverage best practices.

Finally, reap the rewards—savings, agility, growth and ROI. Measure and report them to stakeholders. And enjoy your success.