

FOR: Application
Development
& Delivery
Professionals



Build An Outside-In Contact Center Road Map

by Art Schoeller, November 20, 2012

KEY TAKEAWAYS

Link Your Contact Center Investments To The Customer Experience Ecosystem

Organizations have struggled to turn contact centers into something more than a cost center. Today's emphasis on customer experience provides an opportunity to elevate the importance of agent-assisted service and lobby for investment. A well-organized contact center road map is the tool to communicate those needs.

Identifying Synergies In The Customer Experience Ecosystem Drives Differentiation

The challenge for many enterprises is how to support consumers who begin transactions on one channel and then move to another. This cross-channel behavior provides an opportunity to differentiate, but cannot be done unless contact center road maps are coordinated with web, mobile, and social service channels.

Move Away From Telephony-Centric Contact Center Road Map Planning

Past contact centers' telephony-centric road map planning has focused largely on more proprietary hardware elements. Today, the technology shift to integrated software suites lends itself to more standardized applications software planning and integration techniques. This approach can lead to service differentiation via cross-channel integration.



Build An Outside-In Contact Center Road Map

Road Map: The Contact Centers For Customer Service Playbook

by [Art Schoeller](#)

with [Kate Leggett](#), [Stephen Powers](#), and Rowan Curran

WHY READ THIS REPORT

This report outlines the road map planning of Forrester's solution for applications development and delivery (AD&D) professionals working in customer service. For most industries, a large percentage of customer contacts need support from contact center agents. Developing a solid contact center road map in the context of a broader customer experience (CX) ecosystem allows enterprises to differentiate themselves from the competition and reduce costs. But this requires a shift in the roles that have traditionally driven contact center investment plans and a shift in approach to road map planning. Today, contact center technology has not only shifted to more integrated software suites but also to cloud deployment models. Traditional "like-for-like" migrations and upgrades that retain a telephony-centric mentality will restrict enterprises from taking full advantage of the broader customer experience ecosystem and opportunities to differentiate themselves.

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Forrester Research conducts contact center road map assessments along with providing enterprise customers guidance on inquiry calls. The approach and methodology in this paper is an outgrowth of those client engagements.

Related Research Documents

[Design Your Contact Center From The Outside In](#)

August 9, 2012

[Create A Living BT Road Map](#)

May 23, 2012

[The State Of Customer Experience, 2012](#)

April 24, 2012

[TechRadar™ For Business Process](#)

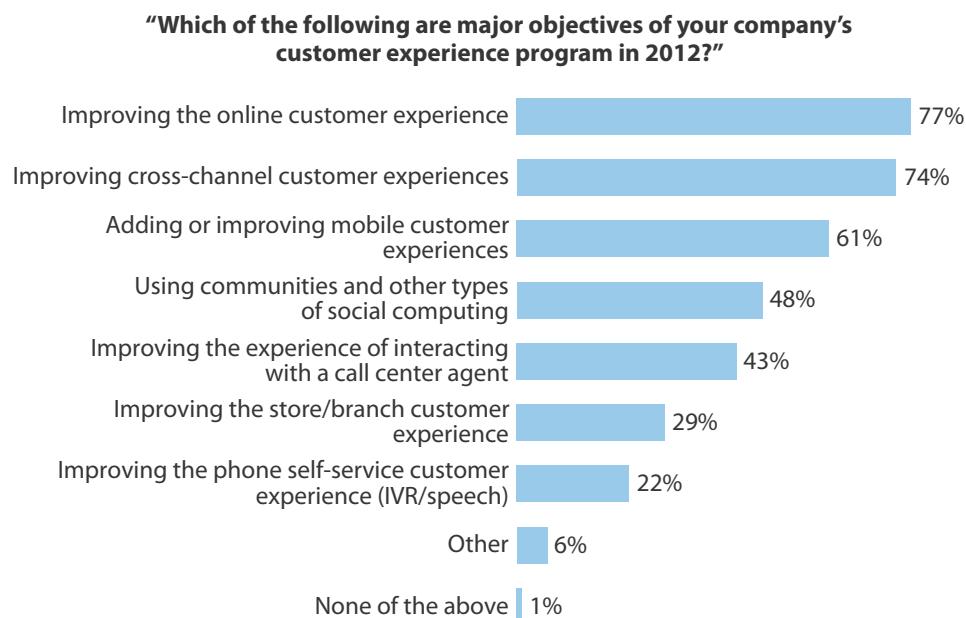
[Professionals: Contact Center Solutions, Q3 2011](#)

August 29, 2011

LINKING THE CONTACT CENTER ROAD MAP TO CUSTOMER EXPERIENCE STRATEGY

For many enterprises today, the discipline of customer experience is a work in progress. Newly established teams that define strategy and drive investments are evolving their relationships with many legacy teams; one example is the contact center, which represents only a portion of the customer experience ecosystem.¹ These customer experience teams have a daunting task to align, integrate, and optimize the overall corporate strategy into detailed goals and objectives. Newly emerging channels such as social and mobile are important, but at the same time a significant volume of customer contacts still require agent assistance. For this reason, firms must develop a solid contact center road map in the context of all customer experience priorities (see Figure 1).

Figure 1 Customer Experience Investments Span A Wide Array Of Touchpoints



Base: 86 customer experience professionals
(multiple responses accepted)

Source: Q4 2011 Global Customer Experience Peer Research Panel Online Survey

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Source: Forrester Research, Inc.

The Contact Center Road Map Helps Drive Differentiation

Differentiation is the top goal for 75% of enterprise customer experience programs.² At the same time, no organization has unlimited time and budget to tackle all possible customer experience projects. By aligning the contact center road map with other projects, enterprises can differentiate their service capabilities to:

- **Empower contact center agents who are getting the tougher issues.** Years of investments in self-service options have deflected an increasing number of straightforward customer service requests from requiring support from a contact center agent. This means that improving the tools and training of customer service agents takes on greater importance and provides the opportunity to differentiate.

For example, a large telecommunications firm conducted a comprehensive review of its agent desktop tools with the goal to reduce handle time for key customer enrollment processes. In the midst of this analysis, the firm determined that with a few incremental changes, it could better integrate customer interaction data from web and mobile self-service in the same project. This improved the handle-time reduction goal of 10% to 15% and improved customer satisfaction and retention rates. Linking contact center road map planning with the web and mobile self-service made this possible.

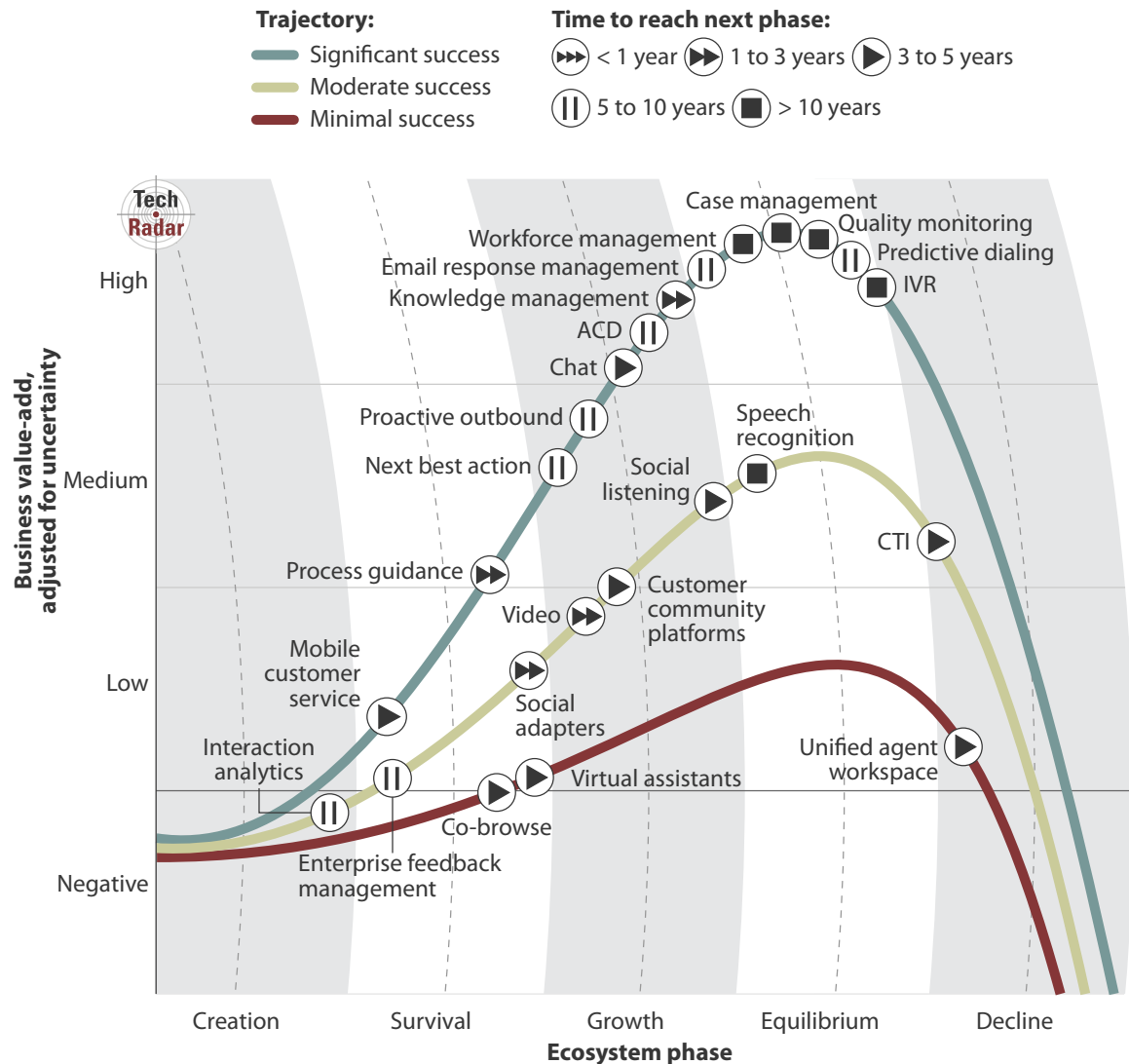
- **Re-engineer contact center architecture to increase flexibility.** For many contact centers, the complexity of systems impedes the ability to make queuing and routing rule changes in a timely and cost-effective manner. This blocks contact center teams from incorporating voice of the customer feedback into improvements in those rules.

A financial services firm operating contact centers across four locations used separate automatic call distributors (ACDs) at each site and linked them together with additional layers of contact queuing and routing software. This included a software-middleware layer that polled each ACD for agent status and an additional level of carrier-hosted interactive voice response (IVR) with toll-free services. While this architecture provided the ability to connect customers with agents with the right language skills across the four locations, the firm found it difficult to coordinate queuing and routing rule changes across all these layers. The existing ACDs had reached end of life, but instead of a simple like-for-like migration, the enterprise took the opportunity to transform and simplify operations on a single, centralized ACD architecture. This would have not been possible without a structured analysis that engaged marketing, contact center operations, and the IT teams planning the migration.

THE COMPLEXITY OF CONTACT CENTER TECHNOLOGIES CAN LIMIT FLEXIBILITY

Most contact centers reflect a long history of integrating a wide array of best-of-breed components whose purpose is to connect customers to agents and track the results. This architectural approach is slowly changing to more integrated software suites and away from more proprietary hardware-oriented technology. Evidence of this movement is found in the maturity of many key contact center components and their consolidation into vendor suites via mergers and acquisitions. Forrester's TechRadar™ for contact center technologies shows a large majority of them at the peak of their maturity curve (see Figure 2). This movement to suites also facilitates the option of cloud services for contact center technology.

Figure 2 TechRadar™: Contact Center Technologies, Q3 2011



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Source: Forrester Research, Inc.

The Evolution Of Contact Center Technology Provides Opportunities And Risks

When faced with the need to update and migrate their contact centers, firms grapple with a strong temptation to stay with what they know. Like-for-like migrations appear on the surface to minimize risk, reduce or eliminate people and process changes, and keep the operation on track to hit its daily and weekly operational goals. This lack of appetite for a more transformational approach results in the following:

- **Limited ability to quickly change queuing and routing rules.** With a growing emphasis on capturing customer feedback via voice of the customer programs, firms need to make process improvements in a more rapid and cost-effective fashion. Like-for-like migrations that preserve the current inflexible architecture prevent this possibility.
- **Inability to leverage cloud deployment models.** An increasing number of companies are investigating cloud contact centers. In some cases, they may realize cost benefits and increases in flexibility. For example, a number of contact center outsourcers serve customers whose traffic is very seasonal. An on-premises approach to contact center technology would result in idle capacity during the lower-traffic periods. Cloud contact center services allow more flexibility to align their infrastructure expenses with the seasonal traffic.
- **Misalignment with vendor road maps.** The maturation of contact center technology has driven a number of mergers and acquisitions and therefore shifts in vendor road maps. Major ACD technology vendor consolidation, such as Avaya's purchase of Nortel and Aspect Software's purchase of Rockwell, has an impact on mid-to-large contact center road map planning. In the workforce optimization category, both Nice Systems and Verint Systems have made numerous acquisitions of call recording, workforce management, and performance management companies over the past five to 10 years. Regularly reviewing and updating the contact center road map will ensure the enterprise stays current on vendor road map changes as well. Without this discipline, firms will experience increased risk of wasted investments in their contact center architecture.
- **Poor road map planning that ignores "adjacent" contact center technologies.** A more comprehensive contact center road map that incorporates the plans for related systems like customer relationship management (CRM) software and web self-service enables better synergies between them. This same concept when applied for the wrong reasons can backfire.

A midsize financial services contact center supporting 300 agents migrated to a cloud-based solution, but the team driving the process did not involve all the right stakeholders. The leadership team had recently led the transition to a cloud-based CRM package and this in part drove its decision for a cloud contact center solution. It perceived the synergies of having both its CRM software and contact center delivered by the same vendor, but it did not consider the rigors of uptime and quality needed for voice communications. After four months of continued service disruptions, the enterprise decided to have its infrastructure team procure a more robust cloud contact center service.

CONSTRUCTING THE ROAD MAP REQUIRES THE RIGHT ROLES AND APPROACH

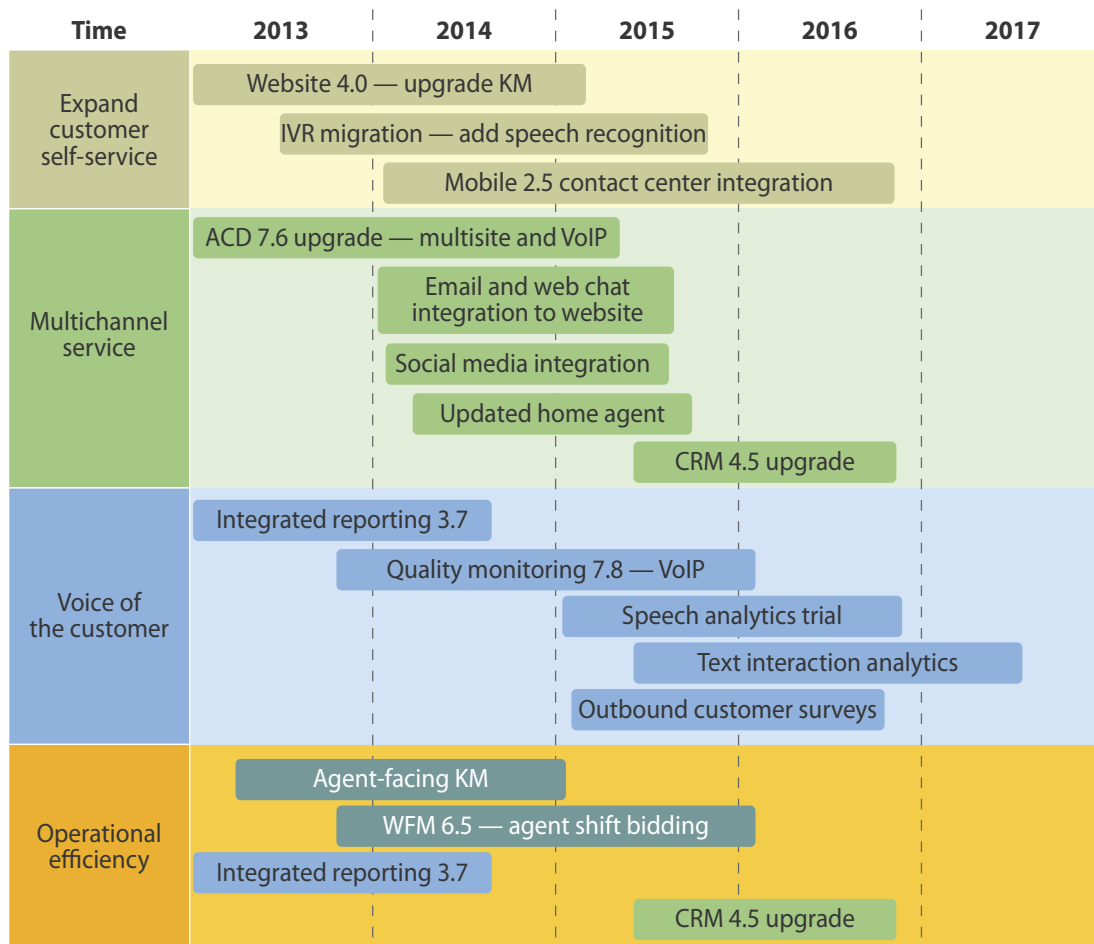
Contact center architecture planning today should incorporate the best practices of IT architectural design and engagement of both business and IT stakeholders.³ This will translate into a more comprehensive approach to the road map that aligns with the customer experience strategy.

Involve A Broader Set Of Stakeholders And Capabilities In The Contact Center Road Map

The traditional approach to contact center road map planning typically involves the IT team supporting the contact center and contact center operations. While this continues to be a critical set of stakeholders, firms have the opportunity to heighten the visibility of the road map to the customer experience team, business unit leaders served by the contact center, and other IT teams that lead additional elements of the customer experience ecosystem, such as teams driving web and mobile self-service. The road map serves as the cornerstone of an ongoing dialogue about refining contact center investments to help achieve competitive differentiation. In particular, organizations should:

- **Incorporate judiciously other elements of the customer experience ecosystem.** To achieve better cross-channel service, other projects, such as web and mobile self-service, should take into account how the contact center is evolving. In addition, any changes to back-end customer-of-record systems must be surfaced in the contact center road map because of their impact on the agent desktop (see Figure 3).
- **Include alignment of resources and change management.** Changes to the agent desktop will require retraining. An upgrade of the core queuing and routing software must involve the IT team and business analysts who monitor and change the business rules for contact flow. Changing the workforce management software so agents can bid on their own schedules involves changes to HR procedures and policies. Because contact centers form a unique combination of people, process, and technology that must work in real time, it is especially important to coordinate road map changes with skills and resource planning.
- **Coordinate the sequencing of customer experience ecosystem investments.** Because separate teams tend to manage self-service technologies, the contact center road map can surface schedule mismatches. For example, an upgrade to the knowledge management system to improve web self-service needs to include the impact on the contact center as they share the same core knowledge base software. Different procedures and teams typically manage external-facing content versus that for the contact center, so a coordinated road map must identify any issues in a rollout of new capabilities.
- **Communicate the contact center road map broadly and regularly.** Many IT teams struggle with devoting sufficient resources to planning. Many firms do this in anticipation of a major systems upgrade. But a better approach is to synchronize and optimize investments in line with the overall customer experience strategy. The road map plan should include a comprehensive business case showing not only financial return on investment but, where possible, a contribution to customer satisfaction improvements.

Figure 3 A Contact Center Road Map Including Adjacent Technologies



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Source: Forrester Research, Inc.

RECOMMENDATIONS

ALIGN CONTACT CENTER INVESTMENTS WITH THE BROADER CX STRATEGY

The new focus on customer experience provides contact center management teams with a long overdue opportunity to elevate their value and associated requests for investment. A key element for communicating the investment is the contact center road map. In particular, companies should:

- **Align contact center road map planning with IT service catalog methodologies.** As contact center technology continues to evolve into integrated software suites, firms must shift from a telecom-centric approach to one leveraging IT service catalog methodologies and standards. More contact center applications can operate on the common infrastructure

(compute, network, and storage) used for the rest of the applications portfolio in the enterprise. This approach allows for more opportunities to integrate the contact center applications with others that are customer-facing such as web and mobile self-service. In addition, it will allow firms to expand the range of contact center deployment options to cloud computing.

- **Use the contact center road map to engage the team driving customer experience strategy.** Companies must manage the overall customer experience ecosystem as an integrated set of capabilities and investments. To optimize all the investments, they must ensure they view the contact center plans alongside others that focus on other elements of the customer experience ecosystem such as web self-service, mobile, and social. Form a customer experience governance council that reviews the contact center road map on a semiannual basis and any other time the firm considers a major investment.
 - **Ensure the contact center road map includes related technology road maps.** To identify potential synergies and dependencies from other elements of the customer experience ecosystem, the contact center road map should incorporate those additional elements. This is especially important to drive the evolution of better cross-channel capabilities that will differentiate the enterprise in the marketplace. Typically important adjacent road maps include CRM, web self-service, mobile self-service, and enterprise business intelligence.
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SUPPLEMENTAL MATERIAL

Methodology

Forrester fielded its Q4 2011 Global Customer Experience Peer Research Panel Online Survey to 86 CX professional(s) from our ongoing Marketing & Strategy Research Panel. The panel consists of volunteers who join on the basis of interest and familiarity with specific marketing and strategy topics. For quality assurance, panelists are required to provide contact information and answer basic questions about their firms' revenue and budgets.

Forrester fielded the survey from November 2011 to January 2012. Respondent incentives included a copy of a report resulting from this data.

Exact sample sizes are provided in this report on a question-by-question basis. Panels are not guaranteed to be representative of the population. Unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes.

ENDNOTES

- ¹ The customer experience ecosystem spans many organizations, processes, and technologies and is not limited to customer-facing entities like the contact center. It is crucial to review and incorporate planning for all elements. See the June 22, 2011, "[The Customer Experience Ecosystem](#)" report.
- ² Source: Q4 2011 Global Customer Experience Peer Research Panel Online Survey. Some 75% of respondents said their executive's aim was to differentiate on the basis of customer experience. See the April 24, 2012, "[The State Of Customer Experience, 2012](#)" report.
- ³ Contact center design needs to not only anticipate multichannel support but also maintaining the context of an interaction that spans channels. See the August 9, 2012, "[Design Your Contact Center From The Outside In](#)" report.

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