



# Navigating the Technology Seascape

April 2023

A CCMA Research Initiative

Supporting Partner



**Route101**

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## A voyage of change

The world of contact centre technology has never been richer or more dynamic than it is today. New offers are launched almost every day. Providers from the well-established to brand-new challengers promise a dazzling array of benefits: the next big thing seems never far away. It has become a central part of every contact centre leader's role to understand how technology can support their teams and customers, build the case for investment, evaluate options, and ultimately implement the new technology and undertake the change management required to get the most from it.

It is a journey that can be fraught. According to McKinsey and Co., about 70% of digital-transformation efforts fail. Most contact centre leaders are not native technologists, and the learning curve can be intimidating. Even experienced leaders find it challenging to make decisions within a seascape that is constantly changing and prone to unexpected storms (like a global pandemic, or an economic shock).

At every stage of the voyage there are critical decisions and actions: from making the case and writing the brief to selecting partners, building, launching and scaling new capabilities. This report captures some of the knowledge and learnings from the experiences of others, and is intended to help anyone looking to maximise their chances of success when embarking on a voyage of change.

## With thanks to

The CCMA and Route 101 extend their sincere thanks to all contributors for their generous participation in the study.

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<sup>1</sup> <https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/successful-transformations>

## Foreword from CCMA

Technology. Contact centres can't operate without it. Regularly upgrading our industry tech helps contact centre operations meet the evolving needs of customers and of colleagues, and operate efficiently. It's become an integral part of every contact centre leader's job to stay abreast of the latest developments in the fast-moving world of tech. With different systems powering different parts of the operation, it's not unusual for a contact centre to have at least one implementation cycle ongoing at any given time.

With so many offers and brands in the market it's easy to feel overwhelmed. It's not easy to cut through the clutter to work out what's right for you. And once you've actually decided on what you

want, how to ensure that implementation goes to plan and that you achieve your desired outcomes?

Until now there has been a distinct lack of information resources that present the key considerations and practical steps for technology selection and implementation. We conducted this research to help fill the gap: to provide insight to any contact centre leader who is or may be contemplating investing in new tech. What are the important things to get right, and what might go wrong? I hope this report will shed some light on these questions.



**Leigh Hopwood,**  
CEO, CCMA

## Foreword from Route 101

Contact centre leaders have historically lacked comprehensive research and guidance on the practical aspects of technology selection and implementation, creating a notable gap in available resources.

Working alongside our clients as they undertake their unique technology transformation journeys, we encounter many of the challenges and drivers explored within this report. The guidance contained herein is, in our view, invaluable to contact centre leaders looking to navigate the potentially treacherous waters of transformation.

Ensuring implementations go to plan and deliver against the necessary outcomes is largely dependent on the creation of a clear strategy and the capacity to navigate mission-critical decisions and actions. Whether defining the initial scope of

a transformation project or identifying objectives, at every stage of the voyage there are challenges to negotiate, and it can be daunting for contact centre leaders to cut through the noise to prioritise the right areas and outcomes.

Together with the CCMA we feel we have developed a resource to provide that crucial insight into the components and factors that determine successful transformation, and to equip leaders with the knowledge and tools necessary to achieve their desired outcomes in technology transformation initiatives.

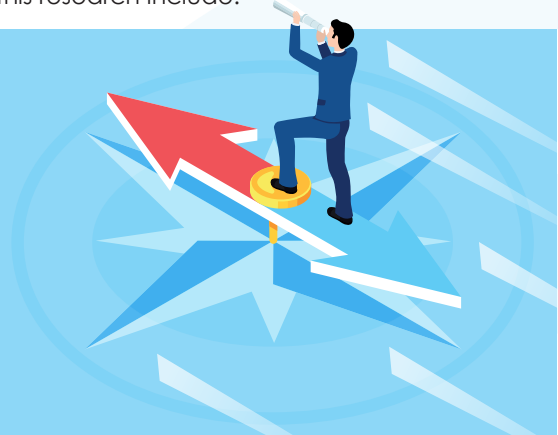


**Russell Attwood,**  
CEO, Route 101 Ltd

## Upgrade use cases are varied

There are many reasons why a contact centre may decide to change or upgrade its technology. Some of the use cases cited by the leaders interviewed for this research include:

- Consistent KPIs for performance and quality management
- Customer targeting and personalisation
- CRM/back-office channel integration
- Decision support for advisors
- Knowledge management
- Resource planning
- Team-building for the hybrid environment



*“Whereas previously your email would go to an email inbox, you might be chatting to us on social and you might be calling us at the same time and you’ve taken up three advisors, now it’s all in one. That one advisor can close the email that’s sitting in the inbox; they can close the social and can be speaking to the customer on the phone. Bringing that together is really helping us be efficient.”*

- Sam Gallimore, Customer Care Product Lead, The Very Group

*“We use data to help identify customers that need additional support and interventions proactively, for example flagging those at risk of lapsing.”*

- Jane Redgrave, Head of Consumer Retention, UK Insurance, BUPA

*“We’ve all had that scenario where advisor and team leader turn up to a performance review, and they’re both looking at different numbers and end up arguing over stats rather than having a meaningful conversation. Our goal was to very much take that away. We built a reporting platform to ensure advisors have the information they need and that managers have the same information.”*

- Alvin Lobo, Head of Performance Management, Dojo

*“We’re exploring how tech can help to enhance those interpersonal connections between colleagues while working hybrid.”*

- Jane Redgrave, Head of Consumer Retention, UK Insurance, BUPA

*“We’ve been able to grow with fewer people than we would have needed had we not invested in the technology.”*

- Helen Davies, Head of Customer Service, Vp Groundforce

Some organisations have an explicit goal to replicate the seamlessness of digital B2C experiences to the platforms used by people working in the contact centre.

# Triggers of change

What are the tipping points that can lead to an upgrade?

- Gaps in customer experience
- Gaps in colleague experience
- Decline in operational metrics
- Platform end of life



## Gaps in customer experience

It's no secret that customer expectations evolve rapidly. Even with the acceleration of investment in recent years in digital and self-serve, many organisations are barely keeping up.

*“Many more of our processes are becoming digital and this is rapidly expanding as we build out our transformation programme.”* - Jane Redgrave, Head of Consumer Retention, UK Insurance, BUPA

*“You can never rest on your laurels. You might have customers come on board who have new needs. We hold quarterly business reviews to understand how our business is evolving and where any new pain points may be emerging.”*  
- Helen Davies, Head of Customer Service, Vp Groundforce

## Gaps in colleague experience

While customer experience has long been a primary driver of change, increasingly the internal user experience is also being prioritised.

*“We are implementing a different knowledge management solution that will better support our people have great customer conversations. Feedback from our teams was that our previous knowledge management solution was clunky and complicated.”* - Jane Redgrave, Head of Consumer Retention, UK Insurance, BUPA

## Decline in operational metrics

When core productivity metrics such as AHT (average handle time), abandon rate and wrap time move in the wrong direction, these can be red flags that lead to a business case for investment.

*“All companies suffered during the Great Resignation period with increased attrition and difficult recruitment. This puts pressure on existing teams and impacts results, so we used that as an opportunity to change our existing platforms, conversation guides and the way we help our customers.”*  
- Jane Redgrave, Head of Consumer Retention, UK Insurance, BUPA

## Platform end of life

When legacy systems become no longer supported or cost-effective to support, it's time to re-platform.

A re-platforming effort initiated as a consequence of end-of-life presents an opportunity to also upgrade other areas that may not have reached the end of their lifecycle, but which nonetheless would also benefit from a refresh. Sometimes upgrading the adjacent tech can be even more impactful than the core refresh itself.

### Strategy can drive proactivity

As organisations strive to upgrade customer and colleague experience, this forms the bedrock upon which a technology strategy can be written and a roadmap drawn. Like all operational environments contact centres can tend to be reactive, upgrading only as needs arise. A forward-looking direction of travel helps contact centres to be more proactive in anticipating their needs in advance.


***“Our CEO has set out a very clear vision on being a data-led business and this pushes us to be more forward thinking and analytical. We are encouraged to be curious about what’s outside of our own world and explore what new technologies and ways of working we can learn from and bring in to help.”*** - Jane Redgrave, Head of Consumer Retention, UK Insurance, BUPA

***“We’ve been clear as an organisation that our goal is to genuinely make all of our customer contact digital-first. That makes strategic alignment quite easy.”*** - Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

# Considerations when preparing to change

Some organisational considerations and learnings around decision making are as follows:

- Centralised versus localised structures
- Shared versus local platforms
- Visibility of leading edge
- Need people to bridge IT and ops
- Effective collaboration between teams
- The value of agile methods
- The 'tyranny of the MVP'?



## Centralised vs localised structures

Within large matrixed organisations the contact centre may be in charge of its own technology, or decisions may be led by central IT and/or innovation teams with oversight over the wider business.

There is no right or wrong way to structure: the most effective approach depends on the specific dynamics of each organisation and it is not unusual for organisations to experiment with different structures over time. Each approach brings potential benefits and drawbacks.

	Central team leads decision making	Contact centre leads decision making
Pros	<ul style="list-style-type: none"> <li>• Reduces duplication of resources</li> <li>• Aligns the tech estate across the organisation</li> <li>• May have a better view of the leading edge</li> <li>• May be able to 'cut through' marketing noise more easily</li> </ul>	<ul style="list-style-type: none"> <li>• Deep understanding of UX and CX needs and pain points</li> </ul>
Cons	<ul style="list-style-type: none"> <li>• May not have the fullest picture of the contact centre's needs or customer needs</li> </ul>	<ul style="list-style-type: none"> <li>• Less visibility of wider organisational needs</li> <li>• May not be at the leading edge of technology capabilities</li> </ul>

Housing decision-making in a cross-functional team can be a more efficient use of resource.

*"The centralised model avoids duplication of pools of people doing similar things. We're trying to have the benefit of a centralised group but then disperse deployment and configuration to the operational areas of the business that use the tools."* - Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

Naturally, the contact centre is best placed to identify customer contact needs and pain points, as well as any issues with the colleague

experience. If decision-making is led outside of the contact centre, the contact centre must have a seat at the table.

*"There's a real desire to consolidate and rationalise into similar technology sets, which is a sound business goal. But the risk is that decision points are too distant from the actual application of those technologies. We need to ensure each business area has adequate input to decision-making to ensure business areas are not adversely impacted."* - Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

### Shared versus local platforms

Some contact centres are free to select the technologies that suit their own requirements without needing to consider the impact on other departments.

Where contact centres are part of a wider customer ecosystem, using shared systems and architecture may be beneficial for example to ensure consistent data capture throughout the customer journey. Another reason for sharing platforms is to be able to leverage skill sets such as data science which may be stronger outside of the contact centre.

***“In some cases, the right thing to do is to push decision-making to a broader group. For certain types of customer demand, customer jobs to be done, contact centres are becoming the minority service channel. You make decisions based around how you best serve your customers where they want to be, which may not be the contact centre. Where that is particularly influential is around the technologies you use to collect, consolidate, and manipulate data. Things like the traditional workforce management tools that we’ve used historically for understanding contact demand are increasingly looking out of date. When it comes to forecasting in particular, the contact centre industry is way behind where we should be. Bringing that data into a different set of tools and into the hands of data scientists who think in a different way to our contact centre teams is a real opportunity.”*** - Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

***“The contact centre solutions have to work with our ERP solution. For us to have that single view of the customer, we got to have systems integration.”***  
- Helen Davies, Head of Customer Service, Vp Groundforce

Conversely, disparity between business units can be a reason to use different platforms.

***“The group has multiple contact centres and will likely always have, because the lines of business are so disparate. For example, there are significant differences between pet and car insurance, and the technologies that are appropriate for a B2B operation will be very different to B2C. You can fall into the trap of assuming because the use cases superficially look very similar, the technology set should be the same. Whereas actually the demands in those businesses are very different and therefore the technology choices you make may be different.”*** - Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

Scale can determine technology needs, for example in workforce optimisation.

***“In a large organisation the biggest lever you have is your ability to forecast and plan and organise your people. But if you’ve only got 20 seats you don’t need a lot of sophistication. If you’ve got 1,000 seats and you can make your forecast 1% more accurate, that’s going to make a big difference and will justify investment.”*** - Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

### Visibility of leading edge

Staying up to date with the technology seascape has become an integral part of the contact centre leader’s role.

***“I’d never want to take my eye off the ball in terms of knowing what else is out there.”*** - Helen Davies, Head of Customer Service, Vp Groundforce

To keep abreast of developments leaders typically use a range of information sources ranging from podcasts and trade shows to analysts and vendor marketing, but the two sources most often relied on are personal networks and knowledge-sharing with peers.

***“The most value we get is from CCMA events. We get to hear best practices and real-life stories of what customers are experiencing.”*** - Alvin Lobo, Head of Performance Management, Dojo

It's essential that contact centres 'look over the wall' and avoid the temptation of sticking with the familiar.

***“There is a risk of an echo chamber in terms of the industry you work in. We need to deliberately look outside of our comfort zone and see what is happening outside. We've got a very active digital team which is a really useful source of input.”***

- Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

Cutting through sales hype to be able to assess the true strengths and weaknesses of tech propositions is critical, but is not easy.

***“It can be a minefield.”*** - Sam Gallimore, Customer Care Product Lead, The Very Group

***“It's entirely possible to be fooled if you're not savvy.”*** - Helen Davies, Head of Customer Service, Vp Groundforce

***“AI is definitely a minefield at the moment. Every group has its own terminology, or they may have different definitions. Even just something like how to express something within IVR, in order to get you to the right place, is not simple.”*** - Helen Davies, Head of Customer Service, Vp Groundforce

***“I pretty much stop anyone in their tracks if they start telling me there's a business case to be made on lowering AHT. If I added up every project that I'd been sold on the basis of handle-time reduction, our calls would be measured in negative seconds.”*** - Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

### **Need people to bridge IT and Ops**

A consistent ingredient in success is deploying people who have the ability to bridge IT and Operations, who understand both environments and can influence in both.

Influencing IT teams requires credibility and an understanding of IT team culture.

Bringing customer and colleague benefits to life is valuable for technical colleagues who typically sit some distance from the front line.

***“We did that a lot on the chatbot, because the engineers would build all of the code but not see our customers using it. We showed them the conversations, pulling out the keywords and the verbatims. We showed them how successful it was in deflecting calls. It got the engineers passionate about the product.”*** - Sam Gallimore, Customer Care Product Lead, The Very Group

It's not unknown for technologists to bridge to operations teams, but it's more common to find people with an operational background who have acquired the knowledge to be influential in IT departments.

***“The main skill is understanding the business outcomes we're trying to achieve, what's going to be different as a result. And to understand enough of the technology to sniff out the truth, or otherwise.”*** - Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

As demand grows for people with a customer background with technical knowledge, this creates career opportunities in the contact centre.

***“I started on the phones at Vodafone. I fell into tech. I'm not naturally a techie. But when you start to have a look at the art of the possible, it gets you excited around what can happen and what you can change. And I get to meet lots of different people as well.”*** - Sam Gallimore, Customer Care Product Lead, The Very Group

**Effective collaboration between teams**

Technology change can only be achieved by cross-functional collaboration, encompassing contact centre and IT at minimum but sometimes other departments as well depending on the organisation. Identifying the required skills and stakeholders and establishing effective ways of working with shared accountability helps to avoid potential gaps, and blaming in the event of problems.

**“Our IT Director led on a lot of the questions around data centres, backups, failovers, escalation processes in the event of failures. I probably could have understood at a high level, but she knew how to really dig into the detail.”** - Helen Davies, Head of Customer Service, Vp Groundforce

Reaching consensus between teams with differing perspectives requires diplomacy and communication.

**“I’ve seen in other businesses this blame game of where the fault lay. It’s really important that IT are engaged and that relationships are built early on. And to have an agreed process of how we’re going to triage and work together to identify where the root cause lies for any problem.”**  
- Helen Davies, Head of Customer Service, Vp Groundforce

IT teams play a crucial role to cross-pollinate learnings and best practice across the organisation, and to bring to the contact centre relevant solutions that have already been developed elsewhere.

**“To be able to use the omnichannel functions of our new platform we needed some development within our ERP system, which is built in-house. It wasn’t classified as a priority in the development queue. But then IT made me aware that another division had already pushed through something similar and all we needed was UAT before release.”** - Helen Davies, Head of Customer Service, Vp Groundforce

**The value of agile methods**

As organisations embrace agile methods, it is becoming common for contact centres to be actively involved in tribes and sprints.

**“The shift to agile has taught everyone a lot and makes bite-sized delivery and rapid change much more normal.”** - Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

**“People think agile is not structured, but actually it’s very structured. We’ll plan two sprints in advance so we know exactly what we’re doing. We’ve got make sure that we’ve got the user stories and the acceptance criteria. We’ll have the technical stories, and the engineers will work with the business to get it signed off, built and pushed for release.”** - Sam Gallimore, Customer Care Product Lead, The Very Group

**“There are two product teams that sit with us in a tribe. We worked closely with them to ensure that our upgrade didn’t interrupt any of their integrations or their evolution of their builds. We’re also part of a tribe which ensures the stability of our core platforms across the business. We’ve become a lot stronger at articulating the problem statement, the solution we’re looking at, the resources we need, cost, and the benefits that we’ll get.”** - Alvin Lobo, Head of Performance Management, Dojo

**“Before tribes I would request a solution architect or an engineer and then it would enter the prioritisation process which was technically focused, not business focused. Now that we’re in the tribe structure, quarterly we’ll come together for prioritisation and decide together.”**  
- Sam Gallimore, Customer Care Product Lead, The Very Group

### The 'tyranny of the MVP'?

A core concept of agile working is the MVP (Minimum Viable Product), which is goes live in the first instance and then rapidly iterated. While MVPs help get to launch far quicker than with traditional waterfall methods, getting the MVP right can be challenging.

*“Often firms are awash with data, but turning this into useful management information is crucial to success. I've learned the hard way on some projects that often it's the less exciting stuff that really matters like data and good agent-level reporting that gets missed in big tech implementations.”* - Jane Redgrave, Head of Consumer Retention, UK Insurance, BUPA

When developing an MVP, it may be helpful to consider 'minimum customer detriment' – the principle that a launch cannot happen until the organisation can be confident of minimal negative impact on users and customers.

*“As part of an MVP there should be a fundamental principle of minimal customer detriment. Every new product we are trying to release is always about improving the customer experience. If we're releasing an MVP that has a detriment, that goes completely against the point. We thrive with the ability to be able to constantly iterate and adjust, but you've got to ensure it's for the good of the customer and that you're not going backwards before you go forwards.”* - Alvin Lobo, Head of Performance Management, Dojo

*“We've tried to do it in a way that limits impact to advisors as much as possible. Inevitably the experience they have passes on to our customers as well. There's a lot of pre-planning to make sure that we're limiting the impact as much as we possibly can.”* - Sam Gallimore, Customer Care Product Lead, The Very Group

# Considerations when selecting technologies and partners

What are some of the critical considerations that typically arise around technology choices and partner choices in the contact centre?

- **Build or buy?**
- **Think about what you really need, and the resource needed to implement new features**
- **Mix and match, or consolidate?**
- **Modular upgrades versus re-platforming**
- **Data strategy**
- **Challenge partners to propose solutions**



## Build or buy?

For organisations that have substantial in-house development capabilities, there is a perennial debate around whether to procure technology from a vendor or to build in-house.

Consensus veers towards buying-in core systems such as telephony and CRM. Requirements for such platforms tend to be fairly similar between organisations, and an internal build would struggle to match highly-developed vendor propositions.

*“Why would you build if your use case isn’t unique and you can buy? Building is always harder than you think. Is there anything different about what you’re trying to do? If not, your default position should be to buy, particularly as almost every technology capability is now available as a service.”* - Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

On the other hand, where requirements are more bespoke and/or the technology can form part of an organisation’s IP, there may be a case to build. Data and analytics is an area where this can manifest. Another is the connectivity between systems, to deliver a seamless customer journey.

## Think about what you really need, and the resource needed to implement new features

New benefits and use cases can be tempting, but decision-makers should be realistic about the relevance of these benefits, to avoid paying for features they end up not using.

*“The question that you have to come back to is ‘which of those bells and whistles will you actually use’? Some of the tools that we’ve replaced were all singing and dancing, but actually we used them only for A to B connectivity.”*

- Sam Gallimore, Customer Care Product Lead, The Very Group

When exploring the art of the possible, it’s important to be aware of any incremental resource requirement.

*“I was so blown away by the [data and analytics] technology. What I failed to appreciate was the resource needed to make it work effectively, resource which we didn’t have. I’ve since advised other divisions within our group to not take the analytics tool straight away.”* - Helen Davies, Head of Customer Service, Vp Groundforce

*“You’ve got to understand the complexity of some tools, and what is required from your organisation to get the most out of them. We’ve all seen the sales pitches and the glossy brochures. But you’ve got to speak to other people that have implemented, and learn from their journey.”*

- Sam Gallimore, Customer Care Product Lead, The Very Group

**Mix and match or consolidate?**

Other than build/buy, another perpetual technology debate is around whether to consolidate capabilities with a smaller portfolio of technology partners, or pick and mix individual functionalities with the goal of achieving best in class for each.

Contact centres can choose to consolidate with vertically-integrated providers, which offer the simplicity and accountability of a one-stop-shop with little to no integration required. Conversely as open architectures and APIs become more established, picking and mixing different vendors within a stack becomes more feasible.

***“We don’t want to put everything with one provider, because if that provider hits problems or has downtime, it doesn’t affect the whole solution.”***

- Helen Davies, Head of Customer Service, Vp Groundforce

Greater commercial flexibility supports a modular approach and reduces barriers to switching.

***“We don’t have anything that would stop us moving tomorrow, if we chose to. We might have to swallow a loss on the discounts, but there are no contractual terms preventing us. We find most vendors are now happy to work on that basis, because they believe their technology set is strong enough to convince you to stay. It makes for a nice open relationship.”***

- Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

**Modular upgrades versus re-platforming**

Regardless of whether upgrades come from different providers or from the same provider, open architectures offer the potential for improving capabilities without the investment or effort of a full platform change.

***“Each change requires a much-reduced investment, whether that’s in cash or in people. Most people would prefer to take a smaller bet than a big bet. It’s easier to buy into a change programme when you know you can stop or change direction if it’s not going well.”***

- Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

Despite the progress that has been made, some leaders believe the reality of fully open architectures still lags the promise.

**Data strategy and future-proofing**

When making any change careful consideration should be given to where data is housed, how data will be migrated from current to new systems, and how in the future it will be migrated from the current system to the system that will eventually replace it.

***“Where’s the data stored? And if we move away from you, how do we get our data back? What does that export look like? We’ve got tools that we’ve been with for years and it’s not easy to get data out.”***

- Sam Gallimore, Customer Care Product Lead, The Very Group

**Challenge partners to propose solutions**

Rather focusing on technical requirements only, offering partners sight of business context and challenging them to propose innovative solutions is a win-win.

***“I wrote a transformation-requirements document which was shared with suppliers. But it wasn’t just ‘we need this’. It presented our challenges, the things that we can’t do, our pain points. I wanted the suppliers to say ‘have you thought about this? Did you know this was available?’. That helped in those early stages, the beauty parades. Later when doing site-visits we were able to actually validate that the solutions put forward to us had been delivered successfully before.”***

- Helen Davies, Head of Customer Service, Vp Groundforce

## Considerations around partnering with integrators versus vendors directly

Integrators who support through the upgrade journey are especially popular with smaller contact centres with limited in-house technical resources, but even large organisations with substantial development teams work with integrators as well. This section discusses some of the reasons to work with integrators, as cited by contact centre leaders.

- **Business focus not just technical**
- **Single point of accountability, and greater leverage**
- **IP and experience integrating specific platforms**
- **Professional services to maximise use of new technology**



### Business focus, not just technical

While many technology vendors are investing heavily in their Client Success teams, integrators are typically perceived as having a stronger focus on business requirements and more capable of offering impartial advice.

*“Out of everybody that we approached including integrators and vendors directly, I think nine in total, only three did a discovery phase where they came into the operation, sat down and understood it. Two came in and still delivered a very standard out-of-the-box pitch. The winning partner demonstrated they’d listened to us and understood our business. They used our actual customer journeys for their demos.”* - Helen Davies, Head of Customer Service, Vp Groundforce

*“Our integrator really helped shape the vision. Because they understand our business, they can advise from their perspective what’s possible, and potential pitfalls.”* - Helen Davies, Head of Customer Service, Vp Groundforce

Integrators may still have their own biases when it comes to recommending vendors.

*“Integrators are specialists in the products that they offer. They want to upgrade you to the latest version and stick with that one product.”* - Alvin Lobo, Head of Performance Management, Dojo

### Single point of accountability, and greater leverage

When working an integrator the contact centre typically signs a contract with the integrator who then subcontracts to vendors. This offers a single point of accountability and can tap into greater buying power and commercial expertise. For smaller contact centres being a ‘bigger fish’ can be appealing.

*“We’re small compared with other contact centres. We believe our integrator gives us a more personalised experience. And if they’re not able to solve a problem, because they have a number of customers who use the same products they have more weight with the vendor to prioritise.”* - Alvin Lobo, Head of Performance Management, Dojo

*“I’m not as convinced if we’d have gone directly to a large company that we would have ended up with the same personalised service that we get.”* - Helen Davies, Head of Customer Service, Vp Groundforce

*“I think if we’d have gone to all the providers individually our negotiation position would have been weaker.”* - Helen Davies, Head of Customer Service, Vp Groundforce

### IP and experience integrating specific platforms

Tapping into experience and tools that have already been developed by an integrator can save time and money, even for large organisations with significant in-house development capabilities.

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***“We could have built those connectors ourselves. But they’re highly complex, and we were looking to deploy very quickly.”*** - Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance  
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**Professional services to maximise use of new tech**

Many vendors are ramping up their professional-services offers, but integrators are typically seen as offering an edge.

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***“We bought the Rolls-Royce platform but we only use 10% of its capability and we really want to get the best out of it. Professional services help us maximise how we use our dialler capability, as well as even things like routing and specific messages and personalised IVR. And on the WFM side, how we evolve our reporting and integrate with our HR platform and our app.”*** - Alvin Lobo, Head of Performance Management, Dojo  
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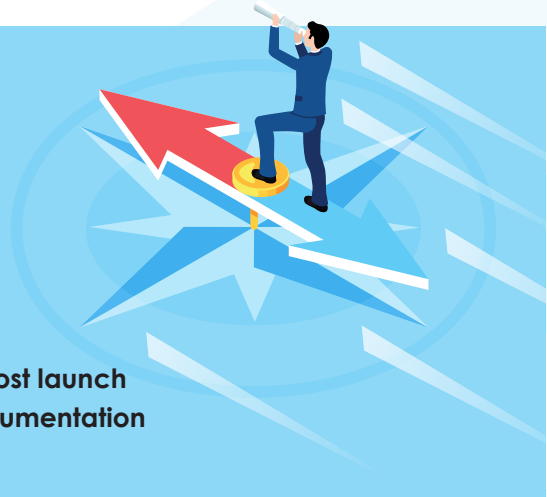
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***“During the pandemic we saw a significant increase in fraud. It hadn’t really been on our radar before then. I asked my integrator if there was any way to record customer email addresses or phone numbers that have been linked to fraud in the system, so we can flag them. They came back and delivered a solution as part of that implementation. It was a real value add and an early sign that they were a partner not a supplier.”***  
- Helen Davies, Head of Customer Service, Vp Groundforce  
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***“Our integrator will reach out to us well in advance to make us aware of updates, making sure that we’re ready. They might tell us they’ve had alerts from other customers and ask us if we’re experiencing this issue. They harness their customer community.”*** - Alvin Lobo, Head of Performance Management, Dojo  
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## Considerations when building and launching

The decision-makers have come together, the plan agreed and partners commissioned. Now it's time to build and launch. Some important learnings for build and launch include:

- Don't underestimate time or complexity
- Have a clear roadmap with room to flex
- Document business requirements clearly in the internal and external brief
- Book resources early
- Align individuals' KPIs
- Prepare for a change in tracking metrics
- Consider need for consultancy hours
- Regularly check in with colleagues during and post launch
- De-risk by spreading knowledge and writing documentation
- Human change management is the hardest part



### Don't underestimate time or complexity

It's very common for implementations to come in behind schedule and behind budget. Building in buffer is therefore essential.

*"It's almost always harder, more complex, more risk prone, and takes longer than then you would like to believe. Even when you think you're being cautious and trying to build fat into your estimates, it's fraught with risk. There's an innate human instinct to be optimistic that's nearly always wrong."* - Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

*"There are going to be things that will blindside you. You need to allow a tolerance within your budget for these."* - Helen Davies, Head of Customer Service, Vp Groundforce

### Have a clear roadmap with room to flex

A clear direction of travel linked to wider organisational mission and objectives helps contact centres become more strategic and proactive in managing their technology roadmap. At the same time, some flexibility to change direction brings the ability to pivot around disruptive new technologies, restructures and changing customer and user needs, not to mention unexpected macro shocks such as a global pandemic or economic crises.

*"We made a bet four or five years ago that in conversational AI our chosen vendor would ultimately win out. We're still working with that vendor and we still think that's probably the right choice. However, we've made sure we've designed our technology in a way that should that prove not to be the case, we can change. In an era where capabilities are evolving really rapidly, you need to design in a way that you can take pieces out and replace with something else."*  
- Barry Webb, Senior Manager, Customer Proposition & Delivery, BGL Insurance

### Document business requirements clearly in the internal and external brief

Implementations tend to prioritise technical aspects in the first instance, and business requirements can be overlooked unless a concerted effort is made to involve business stakeholders throughout the implementation journey. Vendors also have a responsibility to proactively spot any potential gaps.

*"In addition to the deployment of tech, it is a crucial that suppliers share their knowledge to ensure that business customer can get the best use out of that technology and to highlight any gaps. And firms need to trust their vendor's expertise."*  
- Jane Redgrave, Head of Consumer Retention, UK Insurance, BUPA

**Book resources early**

With any project there tends to be a flurry of energy at the outset which is not always sustained through the hard yards of build, launch and iterate. Ensuring that the necessary resources are ringfenced from the start can mitigate the risk of projects dropping down the priority list.

*“Everyone is up for the transformation at the beginning. But budgets then get reviewed, people lose interest or new initiatives come up. Things like reporting take a back seat because as long as the platform works, we’ll fix the reporting later. But actually, you never get around to it. Corners are cut in testing. We were really keen to avoid this, so at the start we prioritised our internal resources to be available throughout the span of the project.”*

- Alvin Lobo, Head of Performance Management, Dojo

**Align colleague objectives**

Building in personal objectives around change outcomes keeps people on track and motivated.

*“From early planning stages right the way through to implementation, they felt accountable. For example, the role of my forecasting and planning manager was to ensure that all the actions related to WFM implementation were completed in a timely fashion and to a high accuracy. That’s the basics. The next bit is where stretch objectives come in. What more can you do? Can you help other team members to complete their actions? If you see problems, are you flagging? Are you proactively offering help?”*

- Alvin Lobo, Head of Performance Management, Dojo

**Prepare for a possible change in tracking metrics**

A step change in metric continuity is common after a change, as different systems can measure the same metric in different ways.

*“In any large tech implementation, basics like reporting will change significantly. It’s important that you understand exactly how things have changed, what reporting is different and why.”*

- Jane Redgrave, Head of Consumer Retention, UK Insurance, BUPA

**Consider need for consultancy hours up front**

In addition to underestimating the resource needed to get the best out of new capabilities, it’s easy to overlook or dismiss the need for support to get up and running, which may then prove to be a false economy.

*“People underestimate the knowledge that’s required to get the best out of the tool. It’s easy to look at consultancy as optional. But in hindsight we didn’t appreciate the learning curve. We could have saved time and money if we’d only spent a little money up front for someone to show us.”*

- Sam Gallimore, Customer Care Product Lead, The Very Group

**Regularly check in with colleagues during and post launch**

A user feedback loop flags any emerging issues in a timely fashion.

*“As you go through your implementation, you’ve constantly got to spend time with the front line. To understand if new pain points are emerging. Having daily standups to begin with, then moving to weekly to monthly calls to work through that constant triage, the inevitable things that you just never could have expected would hit you.”*

- Helen Davies, Head of Customer Service, Vp Groundforce

**De-risk by spreading knowledge and writing documentation**

Change projects typically generate a large quantity of new knowledge which is at risk of vanishing if colleagues leave the organisation. Documenting in writing captures that knowledge and helps others more quickly surmount the learning curve.

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*"It made additional work for me, but I needed to make sure that I wasn't the only one with the knowledge. Over 18 months I wrote a whole series of standard operating procedures, about 40 documented procedures. How to change somebody's proficiency on a scale, how to set up a new user, how to add a new skill. Now everybody's got all this reference material to refer back to, and it can be a training programme for your team leaders."* - Helen Davies, Head of Customer Service, Vp Groundforce

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*"Be honest about why you're making the changes and address the common concerns that come up. I sometimes say 'some of you won't like some of these changes, some of you are going to love it.' Involve a variety of people in creating and testing the solution with you. And know who your advocates are, the people who will help drive from ground up, rather than it coming across as top down."* - Helen Davies, Head of Customer Service, Vp Groundforce

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**Human change management is the hardest part**

As challenging as technical aspects can be, managing the impact on users is typically harder still.

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*"Initially, you've got a huge fear factor. It's a scary process to go through."* - Helen Davies, Head of Customer Service, Vp Groundforce

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# 16 Learnings

## to help you navigate the technology seascape

### Preparing for change

- 1 A roadmap underpinned by CX/EX goals drives a more proactive approach to upgrades as opposed to 'fixing problems'.
- 2 Decision-making led outside of the contact centre brings different pros and cons versus leading from within the contact centre. There is no right or wrong approach - each organisation should decide based on its own circumstances.
- 3 Devolved decision-making and technology choices may be most appropriate where there is disparity across business units.
- 4 Centralised decision-making and platform choices can help to join up customer journeys, and leverage data and analytics capabilities that reside outside of the contact centre.
- 5 Staying abreast of technology is an integral part of every contact centre leader's role.

### Putting the right people and resources in place

- 6 People who can influence effectively across both IT and Operations environments help to ensure customer and user requirements are fully reflected in technology choices and implementation.
- 7 Growing demand for these roles creates career opportunities for technology-orientated people in the contact centre.
- 8 Agile methods are commonplace and can vastly improve speed to market and cross-functional collaboration, but bring potential pitfalls for example MVPs launched with core business needs missing.
- 9 Consider the principle of 'Minimum Customer Detriment' when developing any MVP.

## Selecting technologies and partners

- 10** Even for organisations with substantial in-house development resources, it typically makes best sense to buy in core telephony and CRM systems. However, building the connections between systems and the data and analytics layers are two areas where organisations can create IP and competitive advantage from building themselves.
- 11** New benefits and use cases can be tempting, but contact centre leaders should be realistic about the relevance of these benefits and the resource required to operate them, to avoid paying for features they end up not using.
- 12** Giving partners full sight of business context and challenging them to propose innovative solutions typically yield better outcomes than focusing on technical specifications alone.

## Implementation and change management

- 13** Using an integrator can be beneficial versus working with vendors directly, but integrators may not be completely impartial.
- 14** Having a clear roadmap with room to flex is imperative for any implementation, especially as there is a natural tendency to underestimate time required and complexity.
- 15** It's essential to clearly document business requirements up front and not automatically assume that IT or vendor teams will understand what users need.
- 16** As challenging as technology change can be, human change is usually the bigger challenge.

## About the CCMA

The CCMA is the longest established association representing the call centre industry in the UK. We support contact centre managers through providing opportunities to network; to openly share best practice and to increase their skills and knowledge through specialist training.

Our aim is to offer timely and impartial advice to our members; to keep contact centre leaders in touch with changes in their industry; to provide credible benchmarking information and to help individuals maintain an awareness of the latest trends and developments.

Our membership association is not for profit, and our board is made up of people who work full time in the industry in operational roles. We are run by our members for our members.

**For more information:** [www.ccma.org.uk](http://www.ccma.org.uk) | [@CCMATalk](https://twitter.com/CCMATalk)

## About Route 101

Route 101 is a provider of next generation, SaaS customer engagement platforms, offering award winning solutions from market leading vendors. The business delivers a full range of services to ensure clients get the maximum value from the solutions provided, which includes all associated consultancy, professional services, training, and support.

Offering a wide range of services and solutions that help organisations of all sizes to reduce operational costs, drive efficiency, and elevate their customer experience, Route 101's solutions span the cloud communications spectrum, including omnichannel contact centre, self-service, AI & automation, workforce engagement management, unified communications, outbound dialler, PCI DSS compliant payments, and much more.

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## **Not a member?**

There is no better time to join us. The industry is changing and we are giving our members more opportunities to learn, to network and to support each other.

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