Top 31 Considerations in a Contact Center RFP

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Overview

The playbook for customer experience has been rewritten. Customers expect service 24/7—not only on your 9-5 terms. They also expect support on their channel of choice, whether you are covering it or not. Not only that, AI is rapidly and dramatically changing both agent and customer experiences, and giving those that adopt it a competitive advantage.

While this list is by no means exhaustive, it will give you a better idea of some of the major trends redefining the contact center in 2022. Without further ado, here are the top 31 considerations to ask when you're considering a new contact center solution.

Inbound

1 Please describe your inbound voice capabilities.

Why it's important:

- If you have work-from-anywhere agents and supervisors, they should be able to have crystal clear HD audio no matter where they're located (at home, in the office, on the road)

- Agents may prefer to work from not only computers, but also other mobile devices—is your contact center solution compatible with both?

- If you have (or plan to hire) agents and supervisors in different countries, they should be able to have calls with customers or prospects no matter where in the world they are

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Inbound cont'd

2 Please describe your ACD and IVR capabilities.

Why it's important:

- You'll need something that's easily customizable, ideally from your online dashboard (unless you want to wait days or weeks for simple routing changes to be implemented by an external support or IT team)

- Not all IVR menus are the same (Do you need DTMF / voice-directed IVRs? Can callers make IVR selections by keypad or voice?)

- If you're using a specific queue setup or routing type (availability, longest idle, skills-based, etc.), make sure your provider has it

3 Please describe your process for managing DID phone numbers.

Why it's important:

- If you have a hybrid or remote IT team and/or workforce, phone numbers should be easy to administer remotely

- You don't want it to take days or weeks to get a new number—for example, can a new hire get all set-up within a day?

4 Do you have multi-language support? If so, which languages?

Why it's important:

- If you have customers who speak languages other than English, things like your IVR menu greetings and AI component should be available in those languages as well

- If there is an AI component, it should be able to recognize and transcribe those languages

Inbound cont'd

5 Please describe your contact center recording capabilities.

Why it's important:

- Recording is essential for not only regular QA, but also training and development

- Depending on the nature of your product, you may want screen recording in addition to voice recording (they don't always come together)

- If you want supervisors to be able to train and coach live on calls, look for accurate real-time transcription (some transcription features are post-call)

- Don't forget to determine your data storage capacity and retention duration needs with your provider

6 Do you offer customer-to-agent chat?

Why it's important:

- Some customers may prefer to live chat with agents instead of calling in

- Live chat can be a more efficient channel as agents can handle only one phone call at a time, but multiple chats simultaneously

Outbound

7 Please describe your outbound voice capabilities.

Why it's important:

- If you have sales reps or agents who need to do heavy outreach, you'll need a cost-efficient way of making outbound calls

- For high-volume outbound teams, you may want a power dialer

- Even if the provider doesn't have all the outbound voice capabilities you need, they should be able to provide an equivalent through integrations or partners

Outbound cont'd

8 Do you offer AI-enabled sales tools and real-time assistance for reps? If so, please describe.

Why it's important:

- If you have a sales-focused contact center team, look for AI features that help with objection handling on the call to improve performance in real time

- In addition to real-time recommendations, some solutions can also automate action item logging and post-call summaries to make next steps easier

- Keyword tracking can also be helpful as it allows you to track how often competitors or specific objections come up on conversations

9 Do you offer native CRM integrations?

Why it's important:

- Data entry is one of the biggest time wasters for agents who have to log calls, activities, conversation details, and more

- Your outbound sales solution should allow your team to work natively in their CRM and other customer engagement tools to eliminate app flipping and streamline the sales process

Digital (social, messaging/SMS, video, self-serve)

10 Does it work across public and private social media channels?

Why it's important:

- If you need it, make sure the provider supports both private messaging channels on social and public social channel posting

11 Which social messaging channels do yousupport (or are considering for the future)?

Why it's important:

- Most businesses are communicating with customers across different platforms like Twitter, WhatsApp, Instagram, and Facebook Messenger

- If that applies to you, look for a solution that lets agents manage multiple channels in one place (in addition to other channels like emails and phone calls)

Digital (social, messaging/SMS, video, self-serve)
cont'd

12 Please describe your SMS / texting capabilities.

Why it's important:

- Depending on your product or service, customers may prefer (or be more responsive on) SMS

- Texting can help streamline your communications with customers while engaging them (e.g. booking confirmations, product purchase receipts, delivery updates)

13 Do you offer customer support over video?If yes, do you offer screen recording / capture?

Why it's important:

- Depending on your product or service, it may be easier to provide customer support with a video or screen sharing option

- For your agents' flexibility, look for platforms that are browser-based (which allows agents to share their screens without forcing customers to download an app)

14 What tools do you integrate with?

Why it's important:

- Beyond CRMs, your team may be using other tools such as ticketing systems, productivity suites, and HR systems (e.g. Zendesk and Google Workspace)

- Your contact center solution should integrate with these tools to automate activity logging, event scheduling, and so on

- If you use niche tools, a contact center solution that has an open API will allow you to build custom integrations

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Workforce management & engagement / Quality management

15 Please describe your WFM capabilities.

Why it's important:

- Essential for having the right amount of staff scheduled at the right time to provide the best customer experience possible while streamlining staffing costs

- Look for features like forecasting, scheduling, intraday management, and the ability for agents to easily indicate PTO, change or switch shifts

- For a hybrid workforce, look for a mobile app option

Workforce management & engagement / Quality management cont'd

16 Please describe your QM capabilities.

Why it's important:

- Important for tracking agent performance, measuring the impact of the QA process, and identifying and prioritizing skill development opportunities

- Look for the ability to create and provide agents with online courses and quizzes to ensure continual skill development

- Consider coaching features that help managers solve and improve issues in areas such as quality, behavior, compliance, soft skills

- For solutions that market their AI features, look at their ability to turn customer sentiment into actionable metrics and real-time feedback for agents and leaders

17 Please describe your agent motivation and gamification experience.

Why it's important:

- Used strategically, friendly competition and prizes can motivate agents to perform at a high level more consistently

- Look for the ability to recognize and reward agents with points that they can exchange for gifts, based on their results

18 What are your reporting and dashboard capabilities?

Why it's important:

- Some contact center solutions update dashboards after the fact—not in real time

- For accessibility, look for the ability to pull data and view dashboards in your online account, as opposed to requesting data from the solution's support or IT team

- Supervisors should be able to monitor sentiment on active calls, view CSAT survey results, get service level alerts, and so on

- Solutions should have built-in reporting capabilities like dashboards or heat maps showing metrics such as call volume patterns and average speed to answer

AI / Machine learning
For agents and supervisors

19 Do you offer real-time transcriptions?

Why it's important:

- Having accurate live transcriptions can help supervisors monitor multiple active calls and get full context into each one by scanning the transcript (and without having to listen to them one-by-one)

- Ensure the solution has real-time transcriptions—some tools provide the transcription after the call

AI / Machine learning cont'd
For agents and supervisors

20 Please describe your AI agent coaching capabilities.

Why it's important:

- Essential if you want supervisors to be able to train and monitor calls at scale

- Look for an AI that can automatically surface the right notes or scripts for tough-to-answer questions on agents' screens

- Supervisors should have the option to scan transcripts, listen in, and message agents on the side during challenging calls—before jumping in if needed

21 Please describe your voice analytics capabilities.

Why it's important:

- Customer calls are one of the richest (and least expensive) sources of insights that are already at your fingertips

- Managers should be able to easily pull these insights from conversations (e.g. What topics are coming up frequently on calls? Where are agents getting tripped up?)

- Business leaders should be able to use calls for competitive analysis (e.g. Tracking when competitor names are brought up by prospects or customers, and what is being said; seeing what customers are saying about a new product or feature; etc.)

22 Do you have a sentiment analysis feature?

Why it's important:

- Essential for contact centers with many simultaneous active calls as it helps supervisors understand which calls are going well and which are going poorly (and may need their help)—in real time

- A well-designed sentiment analysis feature should let supervisors see the sentiment of all calls happening at the moment—not just on historical or individual call-by-call basis

AI / Machine learning cont'd
For customers

23 Please describe your AI chatbot (selfservice, virtual agent, for both website and mobile?) capabilities.

Why it's important:

- There are many pitfalls to avoid with chatbots—having flexible customization options and interoperability on both website and mobile can help give customers a better experience

- For a better chatbot experience, look for options for both self-service and virtual agents

Compliance

24 Please outline your regulatory compliance and certification requirements.

Why it's important:

- Information like call recordings and customer data need to be kept private and secure at all times, especially for businesses in highly regulated industries such as law and healthcare, or companies needing GDPR, CCPA or similar compliance

- If your agents collect credit card information over the phone, you'll need a solution that lets agents pause the recording when credit card numbers are spoken (or an API that automatically pauses recording, which can reduce human error)

- Look for certifications relevant to your industry (e.g. HIPAA, FERPA) and look at customer case studies to see if other organizations in your industry are using this provider

Implementation and support

25 Please describe your cloud solution's architecture.

Why it's important:

- The architecture directly impacts call and video conferencing quality, your ability to easily scale up users, the reliability of the platform, and more

- Ideally, a contact center solution should provide the flexibility of the cloud + the quality and reliability of physical telephony for calls

- Ideally, the solution should be a cohesive stack, fully integrated, from a single vendor—it creates a smoother and more seamless user experience

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Implementation and support cont'd

27 How long does it take to spin up a new contact center?

Why it's important:

- Some modern solutions make it possible to spin up a new contact center in minutes, from anywhere in the world

- Review how easy (or difficult) it is to add, change, or delete users or accounts

- Make sure you know who you need to call and how much it may cost

- You should be able to perform simple / routine tasks such as adding phone lines on your own—not all providers allow for this

28 Please explain your CCaaS implementation capabilities. What is the typical timeline and cost?

Why it's important:

- Costs and timelines for implementing a contact center solution can vary widely. Make sure to check the fine print

- Cloud-native or cloud-based providers tend to have easier and faster implementations due to the flexible nature of their architecture

- Some providers have third party teams doing implementations to save money, which tends to result in a more challenging experience for customers

29 How will you support us on an ongoing basis?

Why it's important:

- Some providers are much more "hands-off" while others have no phone support or customer support at all post-purchase—again, make sure to check the fine print

Implementation and support cont'd

30 How much do you charge for support?

Why it's important:

- Customer support costs can be exorbitant if your provider charges for little things like making call routing changes and adding users to accounts

- Some providers charge for every ticket you submit, others charge for the amount of time (e.g. every 15 minutes) they spend on a call with you—while others do not charge extra

31 Please describe your uptime SLAs.

Why it's important:

- Phone calls are still the communications backbone for many companies and organizations, and every minute your phones are down can result in lost business

- Most contact center solutions offer "five nines" or 99.999% uptime—however, 100% is possible

About Dialpad

Dialpad's cloud contact center platform is uniquely integrated into its unified communications platform. That means agents and supervisors can manage customer and prospect inquiries and outreach—in addition to making phone calls, having video meetings, and more, all in one desktop or mobile app. More importantly, it's incredibly easy to use. From adding agents to different contact center departments, to managing phone numbers and changing account settings, all this can be done right in your online dashboard, in minutes. No more having to get in touch with tech support or wait days or weeks for simple changes to be implemented.

Learn more here!