

Effective CCaaS RFPs:

Common Pitfalls and Must-Ask Questions

WHITE PAPER

Organizations moving their customer experience to the cloud through a contact center as a service (CCaaS) solution often take a more circuitous path than necessary. One of the big reasons for this is that they don't ask their prospective providers the right questions before signing on the dotted line. As a result, they're surprised by deployment problems and areas where their provider may not be the best fit to complete the migration from end to end.

Many IT leaders understand the justifications for a CCaaS investment, including the Capex-Opex tradeoff, innovative service capabilities and rapid deployment. However, they frequently don't anticipate the multivendor designs necessary to successfully integrate a CCaaS solution into their business. That means they may not even realize they're looking for a provider that:

- Updates contact center technologies, separating customer service systems from corporate communications and their legacy telephony vendors;
- Creates a omnichannel strategy, integrating engagement channels and workforce optimization tools; and
- Embraces emerging technologies to enhance the customer experience.

Drafting an effective request for proposal (RFP) is a fundamental step toward finding a provider that can accomplish these tasks. By asking the right questions of potential providers through a great RFP, organizations will be able to head off deployment complexities and reap the maximum benefits from CCaaS as quickly as possible. Unfortunately, many organizations fail to ask the right questions during the RFP process, which leads to a misalignment of both technical and business capabilities when it comes time to deploy.

Customers that seek the IT system agility and service enhancements of CCaaS shouldn't rush through the RFP process. By taking time and due care, they can usually sidestep the following common pitfalls and, in the process, ask the most critical questions through their CCaaS RFP.



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PITFALL: Disconnecting technical requirements from business requirements

Focusing solely on technical requirements and scores stands as one of the cardinal sins of CCaaS RFPs. Checkboxes for features like automatic call distribution, interactive voice response (IVR), universal routing and mobile agent tools are definitely important. But they should act only as minimum requirements for choosing a provider.

Customers must also delve into their business needs to plan for a smooth transition and ongoing partnership. Remember, this is a service the organization will engage with—not just a one-time technology purchase. As such, organizations migrating from an on-premises contact center to a CCaaS solution need to think in advance about the entire service experience the business requires. The service experience varies across providers and is often more of a success factor than making sure your team gets every last feature in the CCaaS technology platform.

Service experience factors to consider during RFP include:

- **Global communications consistency:** A globally consistent experience across all devices, with guaranteed application performance for voice and video. This requires a conversation with the CCaaS provider about network availability, resiliency and service-level agreements.
- **Performance management:** Proactive network monitoring services and a unified portal with real-time visibility, performance metrics and controls, as well as custom reporting tools.
- **Service quality:** An experienced and dedicated implementation team, ongoing program management, hardware warranties, 24/7 live technical support, continual employee training, and customer satisfaction or loyalty scores.

RFP QUESTION: How do you ensure a seamless implementation process and deliver a high-quality communication experience for all users around the world?

PITFALL: Failing to account for integrations and complexity

Many providers offer only the CCaaS technology itself, which means the customer must rely on additional partners to handle the underlying IT elements and services. Successful deployment of a CCaaS solution depends on seamless integration and alignment of these technologies and services to establish a functioning call center ecosystem. And yet, most RFPs don't adequately address all the dependencies among the multiple partners and technologies that are so critical to CCaaS success.

Customers should specifically ask whether crucial enterprise capabilities such as SIP trunking, network connectivity, unified communications as a service (UCaaS) technology and security are integrated with the CCaaS solution. If not, who are the recommended partners and professional services to take care of those functions? Most important, who will handle the integration and ongoing management of those CCaaS dependencies?

Integration factors to consider during RFP include:

- **Secure and proven IT architecture:** A well-tested, multitenant solution offering clear visibility into the infrastructure design, security and all integration points, including which features and functions are:
 - **Included:** out of the box versus must be customized and integrated
 - **Provided by a third party:** seamlessly versus must be customized and integrated
- **SIP trunking providers and technologies:** The features each partner offers and the number of parties needed to create a comprehensive solution.
- **Additional IT support services:** UCaaS technology options, managed security services such as threat detection and response, and managed SD-WAN services that allow enterprises to mix and match private and public connectivity types for cost savings.

RFP QUESTIONS: What partners and multivendor components are required to create an end-to-end solution? Can you explain the integration points, roles and responsibilities as they relate to shared product knowledge, interoperation and ongoing maintenance?

PITFALL: Ignoring future business needs

CCaaS acts as a customer experience enhancement tool, provided it gives a single, unified view of the customer. This means the service needs to be able to leverage all available data for heightened levels of intelligence.

To achieve that, the chosen CCaaS must be extensible to emerging technologies. Even if omnichannel tools are not a No. 1 priority and features like chatbots will not be implemented immediately, the customer should consider ways to future-proof the service, inquiring about existing capabilities as well as the product roadmap. This means probing into integration capabilities, strategic partnerships and new technologies that will be either included in the core platform or need to be closely aligned.

Future-proofing factors to consider during RFP include:

- **API capabilities:** Integration and interoperability with business process outsourcing technologies, CRM and other enterprise cloud applications.
- **Virtual agents and advanced analytics:** Chatbots, natural language processing, machine learning, predictive analytics and data-driven intelligence that enhances the customer experience.
- **Security and emerging technologies:** Leadership in security considerations, Internet of Things (IoT) implications, mobility strategies and voice-triggered process automation.

RFP QUESTION: How does your solution enable cloud application integration and facilitate digital transformation via emerging technologies in virtual agents, advanced analytics, voice-triggered process automation, machine learning, IoT and artificial intelligence?

How Masergy can help

The journey to the cloud requires a partner that brings innovative technology, endless IT flexibility and a customer experience that is unmatched in the industry. Offering hybrid deployment models, transport-agnostic network connectivity and comprehensive IT services, Masergy can create a smooth path for global, multisystem contact centers. Masergy makes it possible for customers to quickly consolidate their technologies without taking an expensive rip-and-replace approach.

Frictionless cloud migration

- End-to-end solutions include Global CCaaS and UCaaS, Intelligent SIP Trunking, Managed SD-WAN, and Managed Security services with threat detection and response
- A software-defined network platform designed for voice and video communications delivers global availability and reliability backed by unbeatable service-level agreements
- Advanced tools offer AI-based virtual agents, sophisticated IVR and workforce management capabilities
- Flexible scalability and system integrations for CRM, SaaS applications, and BPO technologies
- Unprecedented visibility and control with a unified view of cross-channel interactions, real-time dashboards, and predictive analytics
- White glove service includes a dedicated project manager and implementation team
- Unparalleled customer experience, as proven by 70 plus Net Promoter Scores for multiple years in a row

Schedule a free consultation with Masergy to discuss your cloud migration strategy.

About Masergy

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