## Technology Focus with Murray Bookman

# Developing a Contact Center Technology Project Plan

**Successfully implementing technologies that will provide measurable, positive results requires thorough upfront planning.**

Today, most contact centers are comprised of technology components from multiple vendors that require integration into a single cohesive system. Therefore, before implementing any new technology, it's essential to develop a project plan that will maximize your opportunity for overall success.

An upfront contact center project strategy should include the following nine steps:

1. Developing a technology architecture
2. Writing the business case
3. Defining all project phases
4. Creating a detailed phase 1 project plan
5. Selecting your project team
6. Establishing status reports
7. Creating a framework for issue and change management
8. Including a method to measure deployment success after completing the plan
9. Defining an ongoing support plan

However, before developing a technology project plan, it's important to consider the following questions:

- What value does this project and each project phase provide?
- Who will be impacted by this project?
- Once implemented, will the technology be maintainable? Can it be efficiently administered?
- Will project team members have fun doing the project and want to be part of the project team?

If after examining these issues you still feel the proposed project is viable and will provide value to your organization, then it's time to develop your technology project plan. This article will provide an overview of each of the nine project planning components.

### 1. Developing a Technology Architecture

There should be no secrets about the technologies being implemented. A target technology architecture will help to minimize any surprises or technological misunderstandings and provide you with a framework for multivendor/multicomponent cooperation and co-existence throughout the project.

Keep in mind that customer contact centers are comprised of numerous disparate technology components that are generally provided by more than one vendor, and each has hardware and software requirements for its respective technology elements. In addition, each component has its own assumption around integration of its interfaces with other technology components, and sizing of components is required to meet customer, transaction and service level needs.

The target technology architecture also provides a framework for business case analysis and project phase definition, as well as a valuable reference document for post-implementation support, minor enhancements and future projects.

### 2. Writing the Business Case

Your business case should include a suite of quantitative benefits and costs. Components to consider include: hardware, software, cabling, facilities, professional services, training (e.g., agent, administration and support staff, supervisors), staffing changes, and ongoing administration and support personnel requirements.

The cost-benefit analysis should contain both financial scenarios of conservative quantitative benefits that have already been signed off on (above-the-line scenarios) and additional potential benefits, including qualitative or more difficult to assess benefits (below-the-line scenarios). The business case can be categorized into:

- **Cost Reduction.** Productivity gains that result in: 1) extractable staff reduction; 2) handling of incremental and, ideally, revenue-generating transactions without requiring additional staff; 3) extractable facility savings; and 4) extractable non-personnel operations expense.
- **Cost Avoidance.** Old or aging equipment and software that require replacement due to manufacturer obsolescence (typically used in below-the-line business case analysis).
- **Revenue Generation.** True incremental revenue realized by new transaction types or measurable additional revenue from existing transactions attributed directly to the introduction of new technology. This would include increased closure rates, upsell and cross-sell opportunities, and customer acquisition.
- **Revenue Leakage.** Legitimate fees that your company can charge an end customer (consumer or business) or cross-charge another department for a service you are providing. The introduction of new technology provides the opportunity to examine your transaction call logging to effectively reclaim revenue that was historically considered lost. For example, if your center takes phone calls for another division in your organization, capturing those transaction types should ensure, at a minimum, cost recovery for the work effort within your operation.

Any impact on service level objectives that may result from the technology initiative should be factored into the business case, as applicable. For example, a new technology may require fewer resources to meet the same service level objective, thereby providing measurable cost reduction. Alternatively, you may wish to enhance your service level, in

which case, the introduction of new technology would achieve the higher service level with the same resources compared with the existing technology, which would require additional resources.

The key is to document and examine the applicable business case scenarios for your particular business. Be sure to integrate both one-time and ongoing costs and benefits into a multiyear cost-benefit analysis, which will provide you with such business case metrics as return on investment and internal rate of return for multiple scenarios.

## 3. Defining All Project Phases

The goal of your contact center technology initiative should be to realize your target technology architecture over time — and not try to implement the entire project in one phase. Successful initiatives split the overall project into smaller chunks of work with quantifiable, measurable results. This minimizes risk while providing tangible benefits over time.

Typical project phases include functional specification (entire project and delineation by project phase), establishing lab system and, for each project phase, proof of concept, pilot and production rollout. For certain projects, an iterative phased approach is recommended with the project phases repeating themselves with incremental technology and process enhancements per iteration.

It's also important to consider agent training and ongoing operations issues when defining your project planning phases. This ensures a balance between project benefit goals and the management of human resource changes.

Implementing new technologies may expose gaps in your current organizational structure, such as communications between IT and telecom groups. This will need to be resolved prior to (or during the early stages of) the project. Also, take into account the business processes that drive the contact center before deploying any new technology. Some processes may be hindered by replacing antiquated systems that have been fine-tuned over the years. Comparable solutions will need to be derived.

## 4. Creating a Detailed Phase 1 Project Plan

Prior to commencing each phase of the project, develop a detailed project plan that includes the following items:

■ **Project Charter.** The project charter provides a clear, "plain English" definition of what will be delivered by this particular phase of the project. It includes team members required for project planning and implementation, explanation of what is in scope and also what is out of scope, assumptions, critical factors for success, planning timeframe and planning budget. The project charter becomes the input document for the more detailed project planning activities for this particular project phase. The project charter document identifies the project sponsor and, if applicable, a steering committee to provide guidance during the project to ensure it stays on track. The project charter can also address project communication, especially during project planning.

■ **Work Breakdown Structure.** A comprehensive suite of tasks should be identified, with each task assigned a task prime for further definition. This is known as the work breakdown structure (see box, left). It should address all project components — including facilities, technology and human resources — during the project, as well as methods and procedures for ongoing support.

### Sample Work Breakdown Structure

For a multisite enterprise customer-contact initiative, the work breakdown structure tasks might include the following:

**1. Architecture Overview**
- 1.1. Enterprise network
- 1.2. Multisite infrastructure
- 1.3. Technology constraints
- 1.4. Architecture principles
- 1.5. Enterprise contact routing model
- 1.6. Contact-handling model (e.g., 800 number, collaboration, chat, email, fax, video, mail, electronic transmission)
- 1.7. Contact qualification model
- 1.8. Contact flows across delivery medias/channels
- 1.9. Inbound contact handling
- 1.10. Outbound contact handling
- 1.11. Agent contact interaction
- 1.12. Contact transfer
- 1.13. Voice recording
- 1.14. Workforce management
- 1.15. Software requirements overview
- 1.16. Multisite operational management
- 1.17. Hardware configuration overview

**2. PBX/ACD Configuration**
- 2.1. Dial plan
- 2.2. CTI configuration requirements

**3. IVR Configuration**
- 3.1. Interactive voice response (IVR) configuration
- 3.2. IVR "startup script"
- 3.3. User script guidelines

**4. Third-Party Interface Specification**

Note: It is assumed within this work breakdown structure that the CRM and billing system, for example, if required, are separate and distinct projects. However, the integration of these systems into the contact center technology infrastructure are within the scope of this project and associated project tasks.

**5. Reporting and Database Configuration**

**6. Fail-Over Strategy**

**7. Test Plan**

**8. Training Plan** (e.g., agent, supervisor, line-of-business executive, administration, technology support)

**9. Operational Plan**

■ **Task Definition.** While developing the work breakdown structure, it is recommended that a single person be assigned with prime responsibility for each task. During project planning, the "task prime" works with the appropriate individual he or she deems necessary to complete the task plan. The task plan should include:

1. Task name
2. Task description (in plain English!)
3. Inputs
4. Outputs
5. Task project schedule (including resources by task element and time)
6. Assumptions
7. Task dependencies

■ **Schedule and Critical Path Analysis.** The individual task definitions are then integrated into an overall project schedule. The project schedule should be analyzed with respect to those tasks that are on the critical path.

## 5. Selecting Your Project Team

The project team should consist of individuals with a broad range of skills and deliverables. While some project deliverables may require individuals well-versed in specific technologies, others may require those with agent training or change management skills. Your project may also require a mix of internal resources across several departments and external resources from vendors and consulting firms. Be sure to consider ongoing issues, such as change management, support and future contact center or related company initiatives. (The box at the bottom left of this page lists typical project team resources.)

### Resources to Include on the Project Team

- Project Manager
- Line of Business Executive
- Contact Center Manager(s)
- Chief Information, Operations or Technology Officer
- Technology Architect
- Call Flow Specialist
- Network Administrator
- Database Administrator
- Software Application Specialist(s)
- PBX/ACD Administrator
- IVR Specialist
- Desktop Software Specialist
- Reporting Specialist
- Agent Trainer
- Testing Specialist
- Facilities Manager

## 6. Establishing Status Reports

Project communication should be established early in the project and maintained throughout. Inter-disciplinary summary information should be provided to all project team members, key business executives and departments that will be affected.

Status reporting should occur on a consistent basis. Since contact center technology implementation projects generally last less than six months, weekly status reports are recommended. You can provide team members with a consistent status report form that includes a summary of milestones, completion status, issues and action plan for resolution, the planned schedule vs. actual schedule, and budget. One- to two-page status reports generally suffice for summary reporting.

All project task primes should meet regularly through frequent conference calls. In addition, meetings should be held with the executive project sponsor and/or steering committee members, but less frequently (e.g., once per month).

## 7. Creating a Framework for Issue/Change Management

During a technology implementation project, it's inevitable that things will change and issues will arise. Some changes will be foreseen and within the project scope, while others might be unexpected out-of-scope issues. A framework for issue and change management should be discussed upfront during project planning. You can develop a tool (such as an issues and change management form and summary tracking log) to ensure that issues and changes are declared as they occur, and proactively managed and integrated into the project as necessary. Appropriate approval mechanisms and processes need to be documented and put in place to ensure that the key customer or executive sign-off on scope changes and budgetary or scheduling modifications is successful.

## 8. Measuring Deployment Success after Plan Completion

To gauge the success of the project and map the benefits against the original ROI model, it is important to put in place a tracking process. Tracking metrics may include the change in cost per call, service level change realized, or change in time per transaction.

The measures you put in place will become the key indicators of the project's success and potential ROI. You can create summary reports of the information to distribute to company executives and operations management.

## 9. Defining an Ongoing Support Plan

During project planning, it is crucial to address any post-project activities, which may include agent and supervisor training, system administration and end-user support. For instance, you may want to plan for training of key IT and help desk personnel during the implementation to ensure a smooth transition from project activity to ongoing support activity. It is highly recommended that support personnel be trained on the technology during the initial stages of the project to ensure they have a solid knowledge of the technology being implemented as well as project-specific information.

## Proper Planning Is Key to Success

When developing a contact center technology project plan, your overall objective should be to organize a project that provides incremental, quantifiable, measurable and realizable deliverables over time. CCMReview

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