



COMPLEX CONTACT CENTER  
DIGITAL TRANSFORMATION PLANNING



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These high-level guides provide reference points supporting the planning of the digital transformation or cloud migration of complex contact center assets to Cloud Services (CCaaS) using simple industry methods.

There are many different interpretations of “digital transformation” for various type of business sectors, solutions and operations. The simple methods described here concentrate on the areas supporting telephony and other interaction channels, customer experience (CX) unified communications (UC) and customer relationship management (CRM) - specifically for complex contact center operations. It is based on simple, Six Sigma methods (DMAIC) which cater for complex problem solving in any industry. These guides aim to provide points of reference and sign posts for where to begin - what to gather - how to plan - and how to migrate more complex operational environments, ready for transform complex contact center assets to a Contact Center as a Service (CCaaS) Platform.





**CX-DX** are a UK-based service provider with goals to provide remote consultation, education, training and program support for businesses who need assistance in planning complex contact center digital transformations.







## DEFINITIONS

 <p>Business Goals</p>	<p>To <b>establish</b> the ground rules for <b>business goals</b>, all stake holders must be identified, with roles allocated within the program. <b>Formal</b> digital transformation <b>education</b> should be directed at this core group, to ensure clarity and vision of the purpose of the program.</p>	<p>Identify all Stake Holders</p> <p>Individual Business Unit Goals</p> <p>Collective Business Unit Goals</p> <p>Create Business Goals Agreement</p>
 <p>Program Budgets</p>	<p>An early driver for transformation is in recognizing the <b>cost savings</b> which can be achieved, by migrating services to the Cloud. This should be calculated using existing <b>operating costs</b>, the cost of transformation and the anticipated costs after migrating to Cloud Services.</p>	<p>Current Operational Costs (OPEX)</p> <p>Transformation Costs (CAPEX)</p> <p>Future Operational Costs (OPEX)</p> <p>The Cost of Doing Nothing (BOTH)</p>
 <p>Business Plans</p>	<p>The <b>goals</b> of each Business Unit should be taken into consideration, for a consolidate Business Plan. Where <b>legacy plans</b> exist, these must be combined into a core digital transformation Business Plan.</p>	<p>Existing/Legacy Business Plans</p> <p>Ongoing/Operational Plans</p> <p>Migration/Transformation Plans</p> <p>Digital Transformation Business Plan</p>
 <p>Business Strategy</p>	<p>Each Business Unit submits their own strategy, defining goals at 6- 12- and 24-months. These <b>strategies</b> are aligned and appended or amended, as necessary, to create a formalized, <b>central Business Strategy</b>.</p>	<p>6-Month Business Strategy</p> <p>12-Month Business Strategy</p> <p>2-Year Business Strategy</p> <p>Combined Business Strategy</p>





## MEASUREMENTS

 <p>Journey Mapping</p>	<p>A series of investigations will be required to <b>map out existing business, operational and technical processes</b>. Within that investigation, scoring mechanisms will define the effectiveness of those processes, through journey mapping, gap analysis, break fix or quick wins.</p>	<ul style="list-style-type: none"> <li>Identify Channels</li> <li>Identify Processes</li> <li>Identify Interactions</li> <li>Identify Workflows</li> </ul>
 <p>Process Mapping</p>	<p>Process Mapping is broken down into <b>four main groups</b>, each of which is defined as cornerstones for ensuring that migrations or transformations perform - at least - the same operations - if not, then they exceed the minimum requirements, by addition of automation, etc.</p>	<ul style="list-style-type: none"> <li>Business Process Mapping</li> <li>Operational Process Mapping</li> <li>Technical Process Mapping</li> <li>Support Process Mapping</li> </ul>
 <p>Workflow</p>	<p>As with Process Mapping, Workflows concentrate on the <b>Platforms, Solutions and Systems</b> in use to support those processes. Within these studies, the same cornerstones are investigated, to ensure existing and future work flows are fit for purpose.</p>	<ul style="list-style-type: none"> <li>Platform Workflows</li> <li>Solution Workflows</li> <li>System Workflows</li> <li>Support &amp; Change Workflows</li> </ul>
 <p>Workforce</p>	<p>Where this already exists within the current operations, Workforce Management <b>rules, conditions, shifts, bidding, forecasting, adherence and reporting</b> must be defined, for migration. Where this does not exist, focus should be applied on creating this environment for optimizations.</p>	<ul style="list-style-type: none"> <li>Workforce Management</li> <li>Forecasting</li> <li>Adherence</li> <li>Workforce Business Parameters</li> </ul>

## ASSESSMENTS

 Functions	<p>With all the insights into an existing environment available, <b>assessments define what functions and operations are required, in the target CCaaS solution.</b> This may also include desired integrations, optimization, automation, channels, interfaces and access rules.</p>	Platform Functions Solution Functions System Functions Channel Functions
 Inter-Operability	<p>Interoperability is about the target CCaaS platform's ability to "port over" or accept interaction data from existing - or planned - operations. This includes all <b>data</b> and <b>telephony</b> elements, along with existing <b>CX, UC, CRM, OMS, IMS</b> and any <b>3rd Party</b> Peripheral Solution Data.</p>	Telephony (PBX/ACD) IVR (DTMF/ASR/TTS/NLP) CX and CRM Business Data Channel Interaction Data
 Features	<p>A <b>list of required features</b> - based on all inputs - is tabulated, with defined criticality applied within a <b>severity matrix</b> (1-5), based on risk factors and desirability. These requirements are measured against the available target CCaaS Platform features.</p>	Channel Features Interaction Features Business Features Administrative Features
 Channels	<p>For each element of functionality, interoperability and features - focus is applied on the existing or desired CX channels for inclusion. This provides all parties with a <b>"top down" view of the suitability</b> of each CCaaS vendors Platform, for comparison and down-selection.</p>	Voice Channels Text-based Channels Social Media Channels App and Web Channels

## IMPLEMENTATION

 <p>Plans</p>	<p>Following a standard hierarchy - using the information gathered - a series of <b>Business, Delivery, Migration and Transformation plans</b> are devised. This includes all roles and responsibilities for each entity identified within the previous Phases.</p>	<ul style="list-style-type: none"> <li>Business Planning</li> <li>Delivery Planning</li> <li>Migration Planning</li> <li>Transformation Planning</li> </ul>
 <p>Phases</p>	<p>Delivery, Migration and Transformation Plans are delivered in pre-define Phases - where <b>Production, Pre-Production, Development, Pilots</b> and other environment pave the way for subsequent Phases for Delivery across a complete enterprise or business structure</p>	<ul style="list-style-type: none"> <li>Initial Build Phase</li> <li>Customization Development</li> <li>Integration Development</li> <li>Environment Builds</li> </ul>
 <p>Delivery</p>	<p>Delivery planning includes all aspects for co-ordination and orientation for <b>the migration or transformation of operations, to normal daily use</b>. This may include planning for <b>Go/No Go milestones</b> and other aspects typically defined within a Deployment Plan.</p>	<ul style="list-style-type: none"> <li>Deployment Plan</li> <li>Implementation Plan</li> <li>Day 1 Launch Plan</li> <li>Day 2 Support Plan</li> </ul>
 <p>Support</p>	<p>Using the information gathered during the assessment phases, Support is defined in 4 distinct areas, designed to <b>assess, triage, report, monitor</b> and apply processes which allows for <b>root cause analysis</b> and resolutions in the target CCaaS Platform environment.</p>	<ul style="list-style-type: none"> <li>End User Support &amp; Information</li> <li>Administration &amp; Supervisor Support</li> <li>Configuration &amp; Development Support</li> <li>Incident &amp; Trouble Ticket Management</li> </ul>

## QUALITY CONTROLS



Bench  
Marks

Quality Control Benchmarks (sometimes referred to as **SLA's** or **KPI's**) are defined to ensure that the target CCaaS Platform is providing services within an accepted tolerance levels. The meters and measures deployed are dependant on both Business and Operational Rules.

Platform Security Benchmarks

Solution Availability Benchmarks

Channel Availability Benchmarks

Incident Responses & Resolutions



Monitoring

Platform Quality Control Monitoring is provided by each CCaaS Platform Vendor as an **industry standard**. A business may elect to define other parameters for monitoring purposes, under a specific agreement with the CCaaS Platform Vendor, under an additional cost.

Platform Operational Monitoring

Solution Operational Monitoring

Channel Operational Monitoring

Environment Operational Reporting



Reporting

Platform Quality Control Reporting is provided by each CCaaS Platform Vendor as an **industry standard**. A business may elect to define other parameters for reporting purposes, under a specific agreement with the CCaaS Platform Vendor, under an additional cost.

Platform Operational Reporting

Solution Operational Reporting

Channel Operational Reporting

Environment Operational Reporting



Change  
Control

Processing methods for local change controls are specific to a customer's business requirements. Core changes across a CCaaS platform are performed ad-hoc and these are not service affecting, so Change Controls are no longer required for those types of changes.

Change Control Governance

Change Control Processing

Change Control Planning

Change Control Implementation



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