8 Traits of IT-Friendly Contact Center and Web Customer Service Software
Caught in the headlights  Life in IT is never easy. You have to worry 24x7 about protecting the enterprise, keeping systems up, and making users productive. While these concerns cause anxiety, demands to lead and innovate usually result in sheer panic.

What the business wants  Contact centers and ebusiness operations want their IT departments to take charge. Besieged by a whole slew of technology trends that won’t go away, contact centers need IT to respond, to draw up and deliver on a smart master plan that includes WEB 2.0, cloud computing, virtualization, going mobile, going green, going social, right-shoring, etc. An indecisive IT organization could slow down the organization, maybe even bring its survival into question.

What IT needs  But IT departments are naturally cautious and inclined to move slowly. Reacting to new trends or leading in times of change is just not their style. The only way out of this impasse is for IT to reduce the risk of quick decisions by seeking out technology they can trust, technology with IT-friendly traits.

In this white paper, we discuss eight IT-friendly software traits that minimize risk, maximize ROI, and encourage innovation. Although the focus is on contact center and web customer service software, the discussion is broad enough to be a valuable guide for any technology investment.

So, what are these 8 traits?

- Trait 1: Silo-breaking
- Trait 2: Architected right
- Trait 3: Flexible and easy to deploy
- Trait 4: Shaped by best practices
- Trait 5: Usable
- Trait 6: Reliable, available, scalable
- Trait 7: Secure and compliant
- Trait 8: Designed for knowledge-sharing and collaboration
Trait 1: Silo-breaking

**Communication silos are expensive.** They cause customer frustration due to fragmented experiences and create high infrastructure costs. With the explosion in customer interaction channels and touch points, it is more important than ever to take a hub approach to managing customer communications. An omnichannel customer engagement hub (CEH)—modular applications built on a platform for sharing knowledge, interaction data, and service processes across channels—is the only cost-effective way to providing the choice and service experience that customers expect today.

Most importantly, a good CEH solution will arm you with a road map for an evolving omnichannel customer engagement hub, a road map for transforming your contact center and web customer service organization in the light of changing customer expectations. Bear in mind that you are not necessarily sacrificing best-of-breed functionality, when you go with the hub-based approach. Look for solutions that are broad and deep and built on a common platform.

**Support for multiple interaction channels**

**IT-friendly contact center software is multichannel by design and not accident.** Forward-looking enterprises leverage a shared services or cloud approach to deploying new interaction channels and touch points. That’s what enables them to add new touch points and offer consistently high-quality experiences.

**Support for multiple business units**

One of the major TCO drivers in large enterprises is the deployment of multiple customer service systems to support their various business units and subsidiaries. The same issue applies to outsourcers that deploy a separate system to support each client. Make sure your customer service software can support multiple departments from a single deployment. This capability enables enterprises to create self-contained implementations that include variables such as the user interface, business rules, reporting, workflow, and knowledge base content. At the same time, these objects and best practices can be shared across departments (or clients in the case of outsourcers) for holistic analysis and performance comparisons across groups.

**Support for multiple languages**

As businesses become inevitably more global, they are faced with the imperative of providing multilingual customer engagement to maximize customer service effectiveness and efficiencies, and differentiate their business through personalized service.
Many customer engagement software solutions require a separate deployment for each language, significantly driving up the total cost of ownership.

When you evaluate solution alternatives, make sure they allow you to provide multilingual service from a single deployment, spanning multiple aspects such as user interface and content. And don’t forget to check whether the vendor has proven multilingual client deployments.

**Trait 2: Architected right**

Every five to seven years, businesses invest in monolithic technology solutions that take years to implement. If market dynamics, consumer technologies, or customer expectations change rapidly—as they did in the last decade—organizations are stuck with expensive solutions that perfectly address the business need of a few years ago! Due to the monolithic nature of these solutions, there remains a costly gap between ever-changing market requirements and the inflexible technology (and process) capability within enterprises. For example, some years ago, companies made significant investment in Customer Relationship Management (CRM) systems. Soon, with new market forces, these businesses felt the need to “multi-source” their customer contact operations, making it nearly impossible to maintain a single repository for customer data. Their expensive CRM systems could deliver value only if all relevant customer data was stored within them. In a fragmented customer data environment (the new reality), most all-in-one CRM systems became square pegs in what was now a round hole. Frontline staff had to devise stop-gap solutions to bridge the gap between the monolithic CRM platform and distributed service processes and data sources.

The need then is not to invest in another monolithic platform based on a big bet, but to develop an architecture that allows businesses to make many small, rapid bets. **Service-oriented architecture (SOA) offers lego-like services that can be assembled and reassembled, enabling businesses to stay responsive to changing market imperatives.**

An IT-friendly solution is based on a modular, multi-tier, standards-based (e.g. J2EE) architecture that also includes support for emerging approaches such as SOA for application development and interoperability; reliability, availability, and scalability (RAS); security; and integration. This approach allows you to reuse existing server infrastructure and application assets and services, and mix and match components to rapidly reconfigure business processes. Benefits include increased ROI, reduced TCO, and increased business agility.
Open BPEL

Platforms that conform to SOA have the ability to easily import and export workflow elements in BPEL format. Not only can applications be driven through BPEL instructions by external sources, the platform can also instruct external systems to act on exported workflow logic.

Open knowledge architecture

In service-oriented CEH platforms, knowledge bases have open interfaces to allow access to content in external repositories from the same UI. Furthermore, the platform is able to export content through service-oriented APIs to server users of third-party systems.

Open, first-class data exchange interfaces

All data that is imported or accessed in real time from an external system is treated as a first-class data element in a service-oriented CEH platform. In other words, applications should be able to perform the following actions (ROLDR is a convenient acronym for them) with all data elements:

- Route
- Operate
- Link
- Display
- Report

Virtualized logical data views across repositories

A valuable capability is to provide aggregated views of business objects (customer records, process workflows, and knowledge) across multiple data repositories that may not be part of the platform. This capability frees application builders from worrying about data silos and the fragmented storage of object attributes.

Componentized, lightweight UI widgets that can be deployed anywhere

An IT-friendly solution assumes that user interfaces will be mashed together by business owners to improve user experience. It does not restrict the disassembling of the out-of-the-box UI and mixing it up with legacy interfaces, business applications, and web pages. To enable use across a range of devices, the system offers componentized widgets with multiple levels of abstraction, such as:

- HTML/CSS
Trait 3: Flexible and easy to deploy

Failed deployments are all around us. Software vendors push one deployment approach over the other—on-premise or cloud—depending on their own architectural strengths, pricing strategies, and business models, rather than focusing on what approach might be the best fit for the customer. Buyers often don’t know what they are getting into. Many organizations have implemented apparently low-cost systems only to get stunned by bait-and-switch tactics of some solution providers. These vendors get buyers when the contract is up for renewal, where they try to monetize perceived switching costs to a steep price increase.

True flexibility

An IT-friendly solution not only provides flexible deployment options, but also offers the ability to seamlessly switch from one option to another. Common deployment options include:

- Secure cloud
- Private hosting
- On-premise

Whichever option you choose, look for solutions that enable:

1. Central installation and deployment
   - EAR installation
   - Virtual server environment
   - Virtual desktop environment

2. Monitoring
   - JMX
   - SNMP

3. DTAP (Development, Test, Acceptance, and Production) strategy
   - Software updates and upgrades
   - Configuration, data, and content
**Configurable and customizable**

Examples of other vendor tricks include charging by page views for web self-service, requiring a separate deployment for different views of the knowledge base, or requiring separate deployments to support multiple departments and languages. Then there are the false vendor claims of a single, integrated platform for multichannel customer interaction management. Buyers start with single-channel applications only to find out later that adding new channels entails cross-channel integration efforts. Given switching costs, these buyers fall into the escalation-of-commitment trap, sinking more investments in sewing together applications.

Enterprises need and want customized approaches to business process design and execution in order to create and extend competitive advantage, and to tailor customer engagement applications to their processes and not the other way around. Make sure your customer engagement applications can be easily configured and do not require expensive and time-consuming customization.

**Trait 4: Shaped by best practices**

It is vital to provide best-practice templates that allow businesses to rapidly benefit from the power of well-architected systems. “Time to value” templates, which support common processes found in a customer service or contact center environment, could include:

1. Knowledge base articles for phone, email, and chat interactions:
   - Greetings
   - Compliance footers
   - Marketing banners

2. Workflows for:
   - Auto-acknowledgement
   - Outbound quality checks
   - Supervisory loops
   - Interaction surveys

3. Tailored user interfaces for:
   - Novice agents
   - Expert agents
   - Supervisors
   - Knowledge authors
   - Process analysts
Trait 5: Usable

While user training costs are typically included in TCO calculations, the hidden cost of user resistance to adopting complex user interfaces and running multiple applications during the course of a customer interaction is almost always ignored. A related issue is findability. What use is the knowledge base content if users cannot intuitively, quickly, and easily find the information they need during the course of customer interactions? What use are FAQs if customer queries are very broad and infrequent? If agents cannot find knowledge base information easily, they will stop using the system, a major hidden cost that is not captured in traditional TCO models.

Software usability is a major cost driver that cannot be covered up by over-investing in training. Ask vendors about their design and testing processes for usability. Have your agents run the software and compare usability across vendors during the acquisition process. How evolved is the user interface (UI)? Over how many releases has it been refined? Does the vendor allow you to access and leverage data and content from other systems so that the agent does not have to hop across applications to answer customer queries and perform service tasks? Are these integrations out of the box or costly custom projects? How many clicks does it take to accomplish tasks ranging from the simple to the complex? Does your software provide flexible content access methods that enhance findability, increase user adoption and content ROI? Content access is covered in more detail elsewhere in the document.

Trait 6: Reliable, available, scalable

RAS (reliability, availability, and scalability) is critical to the success of any enterprise-class deployment. It is even more important for customer interaction management systems because of its direct impact on customer experience, and immediate and long-term business performance. However, RAS is seldom accounted for in TCO analyses.

Make sure the solution provider has large enterprise clients and supports RAS capabilities such as distributed server support, self-monitoring, fault-tolerance, and hardware redundancy. In the case of on-demand deployments, ask about up-time guarantees. Leading vendors offer over 99% uptime.
Trait 7: Secure and compliant

For security, the system should support:

- Penetration testing
- Both client-side and server-side authentication
- Encrypted data storage

Compliance with industry regulations is another key trait. Consider:

- HIPAA certification
- PCI certification
- Logging of all changes to configuration, data, and content

Trait 8: Designed for knowledge-sharing and collaboration

In an environment replete with mergers and acquisitions, contact center consolidation, outsourcing, product proliferation, and ever-tightening government regulations around customer interactions and service processes, agents and customer service agents are facing a daunting challenge in delivering high-quality customer service and maintaining process effectiveness and efficiencies, while keeping costs down. While knowledge management solutions can help, most do not provide in-process interaction guidance or flexible access methods to make it easy for less experienced or outsourced agents to find information quickly and intuitively, and conduct effective customer conversations that are also compliant with regulatory and internal best practices.

Be wary of solutions that take a “one size fits all” approach to content access or knowledge retrieval, and make sure the knowledge management solution can provide in-process interaction guidance to empower a broad set of agents—novice or experienced, in-house, or outsourced. Moreover, such full-spectrum knowledge management solutions will help improve the performance of agents in handling queries that span customer life cycle stages and inquiry types, from the simple to the complex, informational to diagnostics or advisory, post-sales support to pre-sales advice, etc. Also, inference engines can guide agents through a broad set of interactions through an adaptive, step-by-step process, while helping them avoid compliance landmines. Sophisticated knowledge management solutions reduce agent training and staffing costs, lowering operational costs for the contact center.
A final word

It can be argued that software and systems for the contact center are the most mission-critical of all CRM systems since they face customers directly or through agents, and oftentimes, when the customer is having issues with the products and services of a business. Web customer service and contact center downtime, especially of high-profile businesses, receives instant and viral publicity in the age of the Internet and social networking. The careers of IT professionals are on the line when it comes to acquiring, implementing, and managing these high-visibility systems. By picking software solutions with the eight traits described in this paper, IT organizations can increase their odds of success and recognition within their business for a job well done.

Next steps

As a solution provider committed to helping businesses differentiate themselves through best-in-class customer interactions, eGain offers a complimentary, no-risk, no-obligation assessment of your current customer service and support operation in the form of a Best Practice Assessment Study (BPAS). Based on your priorities, the BPAS can be focused on the specific topic of this document or your broader contact center and customer service operation. If you found the content of this document to be useful, we are confident you will benefit from a BPAS engagement with us. To qualify, send us an email at info@egain.com. We will contact you to set up a mutually convenient time to conduct a BPAS.

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