

eGuide:

# 5 Items Often Overlooked in Contact Center RFPs



# HOW TO AVOID THE RFP SOSO TRAP

You **finally** got the budget approval you've been waiting on to upgrade your contact center technology and now you're busy crafting an RFP. A word of advice – make sure you avoid falling into the RFP SOSO (Same Old, Same Old) trap.

Unfortunately, when it comes to RFPs within the contact center industry, the SOSO trap is a fairly common occurrence that causes companies to reinvent, rather than reengineer, the wheel. Many times, RFPs only include questions about technologies already in place versus forward-thinking questions that ask about new capabilities to address age-old issues.

Realistically speaking, you can't ask about something you might not be aware of. Understandably, it's not really surprising that many contact center RFPs are SOSO when you think about the speed of modern technological advances. Even if it's only been five years since you upgraded your communications, so much has changed within a very short amount of time. That fact, coupled with the intensity of managing your day-to-day operations (versus researching technology), makes the SOSO trap easy to fall into.

To avoid the SOSO trap, and ensure that you invest in contact center technology that empowers your staff, improves efficiency and allows you to deliver great customer experiences, be sure to include the following five items in your RFP:



## 1 | Seamless Integrations

Integrations with your CRM, BI tool, ERP and other technology solutions are a must these days. New age solutions deliver APIs to facilitate integrations and/or native, out-of-the-box integrations that make it easy to create a single workspace for your agents and supervisors. If you are currently working with multiple systems at once, determine which solutions or data points need to be shared to provide staff with a single source of information. Even simple integration features such as screen pops and combined reporting go a long way. Integrated features like those not only save time and provide you with a consolidated view of your operations, but also allow for a more personalized customer experience since the agent has their information and history immediately at hand.



## 2 | Multi-Channel

Many providers today offer multi-channel capabilities such as voice, chat, email and conferencing already built in. Think about the channels you currently use when interacting with customers as well as those that you wish you could offer. In addition to tailoring your service delivery to meet the unique preferences of your customers, multi-channel integrations can also give you a more holistic view of your business.



## 3 | Deployment Options

Be open minded when it comes to deployment options. Just because your current system is onsite, doesn't mean your next solution needs to be. Identify what is important to you achieving your business and contact center goals. Then, ask questions around those key components and give vendors a chance to explain which deployment model might actually fit your needs best. Plus, with new, hybrid options available, you might come to find that you're able to obtain the best of both cloud and onsite solutions in one.



## 4 | Enhanced IVR Functionality

IVRs have come a long way from their humble beginnings as simple auto attendants. With a little strategy and the ability to customize newer IVR offerings, you can not only better manage call volumes, but also provide a more personalized customer experience as well as offering self-service options uniquely suited to your customer needs and business processes.



### 5 | A ‘What Did We Miss?’ Section

Every RFP needs an open-ended “catch all” bucket at the end to allow vendors to supply suggestions and insights that might not have been touched upon earlier in the document. Ask each vendor to provide their thoughts on contact center best practices, the specific value they bring, how their implementation processes work and any other recommendations for your company.

#### Summary

Including these five things in your RFP will set you up for success and ensure you are moving your contact center forward instead of staying static. Be open minded and reevaluate your current processes and technology to determine any pain points. By doing so, you’ll be able to streamline your workflows, delight customers and find a lasting contact center solution.

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