Contact Center Discovery Questions

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Executive Summary

This document is to allow for frontline ShoreTel personnel to obtain all pertinent call center data. If this document is completely filled out, ShoreTel contact center specialists, professional services, and solution architects will have the ability to:

- Accurately determine the most suitable contact center offering
- Prepare all personnel for structuring demonstrations

Please fill out as many fields as you can.

Note: This document may be shared with Partners and/or Customers

Document History

Date	Version	Changes
11/24/2007	1.0	Initial Document Development
4/15/2008	2.0	Decoupled SOW Development
9/15/08	3.0	Updated Formatting

1. Opportunity – General Information

a) What is the customer's complete name and address?

b) Who is the partner?

c) Who is the ShoreTel representative (Area SE or Sales Manager)?

d) Please briefly describe the customers existing environment: What technology (IT) systems do they currently have such as Citrix, Call Recording, ACD, PBX, IVR processing etc?

e) What are the features do you expect the replacement contact center to have that are important for your business?

2. Architecture

a) How many sites will have agents? List them (city & state)? Will inbound calls arrive on trunks at each site?

b) Is a ShoreTel IP- PBX being proposed for every site? Will there be any sites that will *not* have a ShoreTel PBX?

c) How many concurrent agents will be logged in at each site? Total?

d) How many concurrent supervisors are at each site? Total?

e) How many concurrent agents will be logged in from home (or remote) locations?

3. Custom Configuration & Design

a) Please describe the types of calls or activities the agents are doing 80% of the time?

b) Would the customer like the end-user to be able to leave a Voice Mail instead of waiting in a queue?

c) What would the customer like to do with abandoned callers? Keep their place in queue and create a callback? Retain and schedule callbacks for a later time? Simply track and report?

4. Enterprise Data Connections

a) Is there a database or CRM system which we will be searching to obtain customer information from? Is there more than one database?

b) Will we be popping any host screen(s) to the agents desktop?

c) How many data transactions will be required for a typical call into the contact center (authenticate, update, extract, etc.)?

d) How will we identify contacts as they come into the contact center (Account ID, Ticket number, RMA number, Caller ID, Loyalty number, Etc.)?

5. Self Service & IVR

a) Is there a current IVR, and what is it doing? Will we need to replace the current IVR? Or integrate to it?

b) Are you looking for customers to be able to speak voice commands in order to navigate the menus or provide information within the IVR or will selections be entered simply through the phone keypad.

c) Does your application need text (rather than numbers/dates/currencies) to be read back as part of the self service application?

d) Is there a possibility of automating repetitive tasks that an agent performs such as RMA Status inquiries, shipping date notification, make a payment, etc.?
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6. Redundancy

a) Is hot redundancy or cold redundancy required?

b) Is it required to have all sites work in a virtual queue?

c) Is it necessary to have each site work as a stand-alone island if the WAN fails?

d) Is it required to run historical reports during a WAN outage from each site?

7. Reports

a) Do you mainly look at statistical reports from the call center? Can you give examples of the main report types that you want on a day-to-day basis? Do you need the ability to track each and every customer call from entrance-to-exit?

b) Does the customer have Crystal Reports? Do they have developers that are skilled at programming Crystal Reports?

8. Hardware

a) Would they like server hardware included? If so do they have a corporate standard for server equipment?

9. Third-Party Applications

a) Is a new archival voice recording solution required? Which ones are being considered?

b) Is a Work Force Management (WFM) solution required? Which ones are being considered?

c) Is wallboard or reader board integration required? Which ones are being considered?

d) Any other 3rd party functionality or integration being considered?

10. Outbound Calling

a) What kind of outbound campaigns do you run? Do you always want campaigns to be transferred to an agent or is it just to leave an automated message for your customer?

b) Is it required to auto-dial hundreds or thousands of number and then connect up to an agent only once a live person is discovered?

11. Multimedia

a) Does the customer accept incoming emails? How many, and would it be a benefit to add email as part of the Contact Center?

b) Is it required for your agents to handle multiple chat sessions or emails sessions from customers simultaneously?

c) Is Faxing part of the contact center? If yes, which enterprise FAX solution do they have or are they considering?

d) Are there other activities in the contact center that they would like tracked in the reports? (I.e. Back office work; work the agents are performing while not directly interacting with customers? Follow-up tasks or work?)