



INTERACTIVE PLANNING GUIDE:

The Essential Guide to Buying a Contact Center Solution

Click the toolbar below to learn what you should be doing in the months ahead.



Know the Terms

- ✓ Review your original contract and verify the expiration date.
- ✓ Understand what is or isn't possible under your current agreement.
- ✓ From a contractual standpoint, know the amount of lead time required if you are considering a change.
- ✓ If your company is planning for next year's budget, make sure a new phone system is on the list.*

* NOTE: Be sure to mention that a new contact center solution doesn't necessarily mean an upfront capital expenditure or increased costs. New cloud-based options can help you to avoid both.

 10-12 MONTHS



Pick your Team

- ✓ Identify an internal team that will be charged with articulating current needs, navigating through various vendors and solutions and, ultimately, assisting in a successful implementation.
- ✓ Bring the group together for an initial meeting and lay out your plan of attack.
- ✓ Articulate expectations with regard to both the final decision and team members' participation.



Perform an Audit

- ✓ With your internal team, revisit overall business objectives and discuss if your current contact center solution is helping or hindering your efforts.
- ✓ Specify what is and isn't working with your current contact center solution.
- ✓ Scrutinize your customer service processes. Is your current technology dictating how you perform certain functions? Articulate what you're trying to accomplish so you can find the right provider to make it happen.
- ✓ Review costs, and be sure to include those that aren't necessarily included in your monthly bill (e.g., energy costs, productivity losses, etc.).
- ✓ Document your contact center wish list with regard to features, functionality, maintenance and reliability.



6-8 MONTHS



Research the Options

- ✓ Perform an online search based on key features or issues you have identified.
- ✓ Explore vendor testimonials, online reviews and analyst insights.
- ✓ Consider attending webinars and/or conferences that speak to your needs and questions.
- ✓ Identify the Top 5 Vendors that appear to meet your needs.
- ✓ Continue to re-group with your internal team to compare notes. Read up on new communications technologies.

 5-6 MONTHS

Vet the Vendors

- ✓ Based on what you learned during the Research phase, contact those vendors that made your Top 5 list.
- ✓ Avoid buyer's remorse by employing a few key actions during the vetting process.
- ✓ Ask for a demo so you can see for yourself if the contact center solution will work the way you need it to.
- ✓ Listen to what vendors are NOT saying as well. Sometimes, the devil is in the details.
- ✓ Gather information on what a typical implementation might look like from your Top 5 vendors. This will help you determine how much lead time you need and how involved your team needs to be during the transition.



3-5 MONTHS



Prepare for Lift-Off

- ✓ If you are not renewing your existing contract, notify your current vendor of your plans based on the cancellation terms of your contract.
- ✓ Work closely with your new vendor to outline an implementation plan that will ensure successful user adoption.
- ✓ Depending on how much time implementation will take, build in the appropriate lead time to allow for a smooth transition from one system to another.
- ✓ Communicate with other departments about timing and plans related to the new contact center solution.
- ✓ Get the new contract signed.
- ✓ Pat yourself on the back for a job well done.

 1-3 MONTHS

NEED MORE INSIGHT?

The experts at ShoreTel can help.
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