

Self-Assessment Questionnaire

The information provided in this assessment will be kept confidential.

Instructions

Use this worksheet to gather your answers before entering your choices into the online survey.

Please mark with a 0, 1 or 2 based on these responses:

2 = We have this capability today

1 = This would not add value to our company

0 = Having this would help our company

1) Contact Information

First Name: _____

Last Name: _____

Title: _____

Company: _____

Email Address: _____

Phone Number: _____

Number of Agents: _____

2) Inbound Activities

Customers can chat with agents through web chat, SMS, and/or mobile apps.

Agents can respond to emails with pre-defined templates

Agents can engage with consumers through social media.

Intelligent routing (based on contextual data) ensures consumers are connected to the most qualified agent or team.

Agents can view previous interaction data to ensure context continuity across channels/interactions.

Callbacks can be scheduled by the customer.

3) Outbound Activities

List management capabilities include automatically uploading call lists and retry management.

Predictive dialer can screen out no-answers, busy signals, answering machines and disconnected numbers.

Wireless numbers can be identified to stay compliant with Federal regulations around automated dialing to cell phones.

Automated consent-controlled routing is available.

Time-zone determination by phone number, postal code, phone/postal combination, or customer preference is possible, expanding compliant calling windows.

Records that must be reached urgently can take a higher priority over other records.

4) Social Engagement

Customer care and engagement extends to social media channels.

Social interactions can be automatically categorized and prioritized based on business rules.

Social engagement service levels can be monitored and measured.

Social teams are managed through Workforce Management applications.

Social conversations for service can be blended with other channels in a unified agent work queue.

5) Self-Service

Self-service is available on more than one channel (e.g., SMS or social in addition to IVR).

Context is preserved across channels, even when going from self-service to agent-assisted, so customers do not have to repeat information.

Context is preserved even when a transaction is interrupted and continued at a later time.

Service channels are personalized using historical context and customer profiles.

Proactive notifications can be personalized so customers only receive information of interest.

Appointment reminders and surveys can be automatically generated and delivered through the customer's channel of choice.

Customers can respond to proactive notifications—for example, change appointment times.

6) CRM Integration

Agents can make a call by clicking on a contact number within your CRM system.

Pop-up screens display contact details including preferences and cross-channel transaction history when agents take an inbound call.	
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A CRM activity record is automatically created once an interaction is completed.	
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A new contact/lead can be created from an inbound call, SMS, chat or web form.	
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A case/support ticket can be created from an inbound call, SMS, chat or web form.	
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All customer activity and history can be reviewed in a single screen.	
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7) Workforce Management

Solution uses a modern graphical web-based user interface with easily understandable icons and widgets.	
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Forecasting models accurately predict the volumes of future customer contacts.	
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Trial schedules can be created and easily tested in "What-If" scenarios before deploying as the official schedule.	
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Intra-day monitoring system issues automated real-time alerts for agents out of adherence.	
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Rich reporting provides valuable insights into historical and real-time workforce performance.	
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Scheduling algorithms can incorporate highly flexible shift bids to enable Gig Economy workers.	
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Supports optimal forecasting and scheduling in multi-skill text-based channels such as chat, email and social media.	
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Agents and supervisors can remotely access important scheduling functions via mobile app and receive contact center notifications in the channel of their choice.	
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8) Quality Management

Uses a modern graphical web-based user interface with easily understandable icons and widgets.	
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Easy evaluation of interactions, calibration/scoring, analytics, customer surveys and coaching.	
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Speech analytics is seamlessly integrated into the standard quality practices to improve efficiency of agents and supervisors.	
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Recording of 100% of voice conversations and agent screens is available.	
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Rules for specifying when recordings take place are sufficiently flexible.	
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System uses an open and non-proprietary recording format, so you are not locked into a single QM vendor.	
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9) Performance Management

Easy-to-use graphical dashboards depicting metrics and KPIs are available to employees at all levels to ensure that individual employee goals are kept in alignment with organizational goals.

Performance management creates valuable reports and insightful visualizations from complex contact center big data.

Automated coaching workflow identifies poor agent performance, selects appropriate coaching and schedules session in WFM.

Is integrated with other Workforce Optimization components and easily integrates with third party data sources, e.g., CRM.

Gamification features ensure focus on achieving important KPIs while keeping agents engaged with leaderboards, badges, challenges, and personalized profiles.

10) Customer Engagement Analytics

Much of the existing quality assurance process can be automated to score and categorize 100% of customer interactions.

Search and score across all customer interaction channels and provide immediate insight.

Solution uses artificial intelligence (AI) to “self-discover” underlying trends that would otherwise go unnoticed.

The customer journey can be tracked across all interactions and customer sentiment understood at each point.

Personal and financial information can be automatically redacted.

Full transcripts of all customer conversations can be created.

11) Back Office Operations

There is visibility into employee availability, work task details, number of tasks, tasks completed and backlog.

Work can be automatically reallocated to another back-office staff member based on backlog and employee skill.

Back office tasks can be automatically redirected to appropriately skilled contact center staff during low occupancy periods.

Work tasks can be captured in multiple systems (such as manual files, fax and email).

Operational management dashboards provide clear visibility into back office KPIs.