



# Getting started

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# Introduction

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Thank you for purchasing the Call Center Planning and Design Toolkit. This toolkit provides:

- a comprehensive **planning checklist** and design **guidelines** for creating a world-class call center (or redesigning the call center you have)
- an **approach** and **tools** to facilitate the successful implementation of your contact center project ranging from strategy and processes to technology and facilities design

The **Getting Started** section provides you with a “1-2-3” framework to guide your thinking. These three areas include:

1. **Contact Center Model**: a high-level framework for thinking about the five main facets of setting up a contact center.
2. **Planning Roadmap**(see attached): a one-page representation, based on the Contact Center Model, identifying the critical topics in each area.
3. **Master Planning Guide** (see attached): a worksheet and checklist that guides you through:
  - identifying the activities you will undertake to get you started on each subject
  - assigning personnel to those activities

To support the Master Planning Guide, the toolkit provides an overview of each key element for call center planning, ranging from business strategy considerations, process planning, technology, human resources and facilities design.

## How this toolkit is organized

Take a moment to become familiar with how the pieces of this toolkit fit together:

<b>MAIN FILES</b>	<b>SUPPLEMENTAL FILES</b>
<p>Contained in each of the six main <u>files</u> is a <u>Table of Contents</u> listing the <u>sections</u> included in that part of the toolkit. The file sections include:</p> <ul style="list-style-type: none"><li>• <b>Getting started</b> (you are currently reading this section)</li><li>• <b>Business strategy</b></li><li>• <b>Processes</b></li><li>• <b>Technology</b></li><li>• <b>Human resources</b></li><li>• <b>Facilities</b></li></ul>	<p>The supplemental files contain the backbones of the toolkit and are an essential part of effective planning and design.</p> <p>The <b><u>Planning Roadmap</u></b> follows the same outline as the files and Sections. (See attachment to this file)</p> <p>The <b><u>Master Planning Guide</u></b> also follows the same outline (See attachment to this file).</p>

## What each section contains

To facilitate usage, each section follows the same general outline after the **Getting Started** file. Content may vary depending on the subject matter. Typical topics covered are:

- definitions and examples of concept being discussed
- benefits
- checklist to get you started
- where to get additional information
- sample document outlines (where appropriate)

## Using the Toolkit

This toolkit is applicable for the following situations:

1. You are starting a completely **new** call center.
2. You have existing call center(s) and need to open **another** one.
3. You are taking over the **implementation** management of a call center project from someone else.
4. You are **managing** a portion of a new call center implementation.
5. You are **reengineering** an existing call center (you want to create a world-class contact center for your organization).

### *If you are starting a completely new call center*

- ☑ Review the Contact Center Model, Planning Roadmap, and Master Planning Guide sections to understand the scope and flow involved in setting up a contact center.
- ☑ Note how the Roadmap relates to the organization of the Toolkit.
- ☑ Read each section quickly to become familiar with each subject.
- ☑ Complete the Master Planning Guide to identify the activities you should schedule and assign personnel to activities.
- ☑ Create a Project Plan and document:
  - the start and end dates of the project
  - the order in which the activities should take place
  - the owners of each key activity

### *If you have an existing call center and need to open another one*

- ☑ Before looking for that second location, review the Contact Center Model, Planning Roadmap, and Master Planning Guide sections to understand scope and flow involved in setting up a contact center. Read the toolkit, reviewing each section from a multi-site point of view:
  - Does your business strategy and contact handling strategy need to be revised?
  - What will be the multi-site considerations?
  - How will the work be split between locations? How large will the new center be?
  - Will management be centralized?
  - How will the two centers communicate?
  - What are the technological requirements (e.g., network, switch, systems, CTI)?
  - How will the organization chart change?
  
- ☑ Note how the Roadmap relates to the organization of the Toolkit.
- ☑ Read each section quickly to become familiar with each subject.
- ☑ Complete the Master Planning Guide to identify the activities you should schedule and assign personnel to activities.
- ☑ Build a Project Plan to document:
  - Activities needed to set up the new call center
  - Changes in strategy, process, technology, and HR to accommodate the new split of work
  - The owners of each key activity

*If you are taking over implementation management from someone else*

- ☑ Review the Contact Center Model, Planning Roadmap, and Master Planning Guide sections to understand scope and flow involved in setting up a contact center.
- ☑ Note how the Roadmap relates to the organization of the Toolkit.
- ☑ Read each section to become familiar with each subject.
- ☑ Gather all existing project documentation, including any project plans.
- ☑ Complete the Master Planning Guide to identify what activities have been completed and which are yet to be tackled.
- ☑ Verify the following:
  - ☑ scope and timeline of contact center implementation
  - ☑ status of all activities with team members
  - ☑ identify issues to be addressed
- ☑ Read in detail the sections of the toolkit that address the areas you will be focusing on.
- ☑ Create or update the Project Plan and Issue List.
- ☑ Communicate to upper management items that are in jeopardy.

### *If you are managing a portion of a new call center implementation*

- ☑ Using the Planning Roadmap, Master Planning Guide, and project plan, clearly identify the scope and timetable of your involvement.
- ☑ Review the toolkit in its entirety to understand the total scope of effort involved in setting up a contact center.
- ☑ Identify activities under someone else's control that are critical to your success.
- ☑ Create a sub-project and issues list for your scope of responsibility to be incorporated into the master Project Plan.

### *If you are reengineering an existing call center*

- ☑ Review the Contact Center Model, Planning Roadmap, and Master Planning Guide sections and read the rest of the Toolkit, reviewing each section to identify all the areas that may need improvement.
- ☑ Conduct an evaluation of each identified area.
- ☑ Create a focus group for brainstorming and defining areas of improvement.
- ☑ Complete the Master Planning Guide
- ☑ Build a Project Plan addressing the identify areas of improvement

With an understanding of the organization of this toolkit and the appropriate checklist in hand, you are ready to be introduced to the primary framework for this toolkit, the **Contact Center Model**.

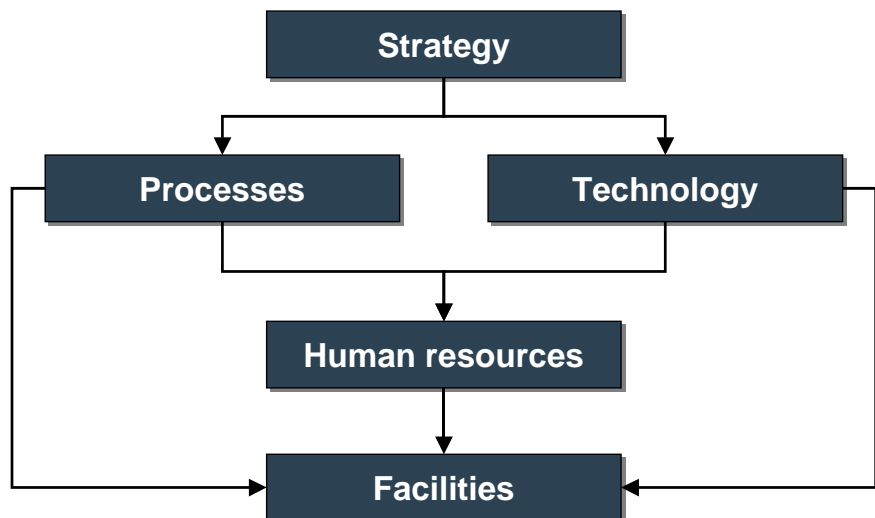


# The Contact Center Model

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The first concept to master is the Contact Center Model. It's a high-level framework for thinking about the five main facets of setting up a contact center. The model is useful to help categorize the required activities. The categories below parallel the organization of the Planning Roadmap, the Master Planning Guide and this toolkit.

Defining the business **strategy** is the basis for defining the **processes** and choosing the **technology**. **Human resource** policies require input from the processes and the technology, and all three will guide **facilities** selection and design.



## Strategy

Your business strategy is the critical starting point for planning a call center. Before selecting the site for your call center, or designing processes, systems or organizational structures, you should define the **role** that the call center will play in the success of your organization. Critical questions include:

- What is the **mission** of our call center?
- What is our **competitive position**?
- What are the needs and expectations of our **customers**?
- What are the primary **goals** and objectives for the center?
- What is our customer **contact strategy**?

The details around business strategy planning are covered in the second files of this toolkit.

## Processes

The core of your call center operation will be your business processes. You will define:

- **why** and **how** customers will contact you
- how your **CSRs** will handle these interactions
- how your call center will handle **day-to-day** business transactions and operations
- how you will manage your call center **staff** and scheduling

Processes are discussed in the third files of this toolkit.

## Technology

Technology will play a key role in the success of your call center. Once you have defined how customer interactions and business processes will be handled, you will need to design the appropriate technologies, select the vendors, install the systems, and train the support personnel. Key technology areas include:

- **Voice:** Telephone Switch, Voice Network, Contact Routing, Interactive Voice Response (IVR)
- **Data:** Workstations, Computer Applications and databases, Customer Relationship Management (CRM) Tools, Computer Telephony Integration (CTI)
- **Web:** Website, Email, Email Management, Web Integration (text chat, web calls, collaboration)
- **Management:** Reporting, Workforce Management, Quality Monitoring

Technology is covered in the fourth files of this toolkit.

## Human Resources

The next step will be to define all the “**people**” elements for your center. The wide range of human resources activities falls in the following categories:

- **Organization:** organizational design, job descriptions
- **Personnel acquisition:** recruiting, hiring, and training
- **Personnel management:** defining career paths to encourage employee retention, performance evaluation procedures
- **Communications:** internal and external

In the fifth files of the toolkit you will learn how to plan for each of these HR areas.

## Facilities

The last key element of the call center model is the facilities. Setting up the facilities involves:

- selecting the city, **location**, and **size** of the call center
- selecting **contractors** and vendors
- designing the interior **space** and furnishing it

Many factors should be considered in facility and site selection. These are covered in the last files of this toolkit.

## Pulling it all together

The five categories are distinct yet **inter-dependent**. Each requires special knowledge and expertise. All of these activities and their interdependencies will be reflected in the Planning Roadmap and tracked in the Master Planning Guide and the Project Plan that are discussed in this Getting Started section. We provide you with checklists and guidelines to ensure that **all** critical elements are addressed while planning for your call center.

Now that you have grasped the concept of the Contact Center Model, you can move on to becoming familiar with the Planning Roadmap.