

Business Process Assessment

Overview



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Overview

This document provides an overview of UltraVox Consulting Business Process Assessment, which is a Strategic Business Consulting service for contact centers.

An assessment focuses on uncovering opportunities for change within an organization through the implementation of the latest, proven contact center technologies.

UltraVox's Strategic Business Consulting engagements typically have three main components. They are described as follows:

1. **Discovery** – A mutual exchange of information. The client provides information about the organization, and UltraVox provides information about the contact center industry, which we term the "Art of the Possible". This will cover technology, but also other processes and trends.
2. **Analysis and Classification** – Armed with the information from the discovery, and the client's perception of the elements in the "Art of the Possible", UltraVox will look for technology infrastructure and applications, along with processes that could be implemented or adjusted within the organization.
3. **Recommendations and Roadmap** – The report and presentation will identify technology and processes that UltraVox recommends should be implemented or adjusted. The recommendations will also be presented in a roadmap form, in order to identify the likely order of the recommendations, budgetary costs and timeline. There will also be an opportunity for the client to direct changes to UltraVox's suggested priorities, roadmap and timeline. Some of these recommendations may be significant enough that a business case, including ROI, could be developed. As a result, the client may wish to proceed with a business case as the next step to this consulting engagement.

General Consulting Method

UltraVox uses a proven, best practices approach to engaging clients. Outlined below is a description of our method.

Discovery

1. Understanding the Organization
 - a. Need enough of a base understanding of the Organization around the types of products / services, market, clients, and structure, as well as current, future, and possibly former goals, in order to align the analysis of the contact center towards those goals
2. Understanding the Contact Center
 - a. In the contact center, a deeper understanding of the culture, processes and systems in order to understand the organization's current execution and delivery capability
 - b. Understand how the contact center provides visibility of its contributions to the corporate strategy
3. Art of the possible – Understanding contact center industry capabilities
 - a. UltraVox sharing its understanding of the contact center industry current capabilities, and where we believe things are headed:
 - i. Technology
 1. Mature or established technology (IVR, routing, email, etc)
 2. New technology (Mobile apps, Social Media)
 - ii. Methods / Processes (e.g. Hosting, Outsourcing, agent pool expansion)

Analysis and Classification

1. Analysis
 - a. Take the information provided and compare with the industry
2. Classifying the Organization
 - a. Classify where the organization's contact center fits in the "Capability & Maturity" model
 - b. Determine gaps, excesses and balanced areas of the contact center within the organization
- c. Determine plausible options for consideration

Recommendations and Roadmap

1. Recommendations
 - a. Recommend status quo and / or changes to existing technology and processes
 - b. Recommend monitoring, or implementation of any new technology and processes
 - c. Explain how these help meet the organization's goals
 - d. High level cost estimate for changes
2. Roadmap
 - a. Map the recommendations into possible tasks or projects, with an order and a high-level timeline
 - b. Allows for an understanding of the cost of investment and the pace of investment over time
3. Return on Investment (ROI)

- a. Depending on the options chosen within the roadmap within the recommendations, an ROI can be generated that proves out the benefits of taking action on the recommendations or roadmap items.
 - b. UltraVox Consulting will use actual customer data and industry best practices to calculate the savings versus the investment.
4. Present Findings, and present and adjust Recommendations and Roadmap
- a. Initial recommendations and roadmap from UltraVox will be dominated by UltraVox's point of view, so the presentation will also be a reality check with the client, providing an opportunity to make adjustments. The timeline could be too aggressive, or not aggressive enough, costs tolerance, or practical considerations, such as impact of existing projects can impact the final roadmap
 - b. These should also be considered living documents, as they will change as the business and the industry evolves
 - c. Final report with adjustments

Tailored Approach for a Typical Client

The following is an example of a typical approach we have used for our clients.

Engagement Planning and Preparation

The first step will be an initial meeting, to kick off the engagement with introductions, identification and preparation activity for the engagement.

Planning and Preparation Meeting (1 – 2 hour conference call):

1. Introductions
2. Review the consulting approach and deliverables
3. UltraVox to deliver the pre-on-site questionnaire and provide a brief review
4. Request for other information could include:
 - a. Contact center technology architecture
 - b. Examples of operational reports, and strategy report (e.g. Customer Service Index)
5. Review the client's organization chart, and determine with whom to have initial pre-on-site discovery meetings
6. Schedule the UltraVox presentation the "Art of the Possible", and determine attendees
7. Preliminary scheduling of on-site visit
8. Preliminary scheduling of presentation

Discovery

Initial high level Discovery meetings would be done via conference call. It allows UltraVox to present its industry knowledge and gather initial information about the client for use in analysis and recommendations.

The Art of the Possible

The Art of the Possible is a presentation which describes the capabilities of mature and emerging technologies, as well as processes and other concepts that are being applied or considered in the contact center space.

It will have several parts:

1. A general contact center organization and technology overview
2. A description of the contact center as one application, instead of a collection of parts
3. Description of many of the typical technologies and media channels in use
 - a. Interaction tools: IVR, Routing, treatment, desktop / CRM
 - b. Operations tools: Workforce management, reporting, Quality Assurance
 - c. Media channels: Voice, outbound, email, chat / Web
4. New technologies
 - a. VoIP Infrastructure
 - b. Workload Distribution
 - c. Mobile Apps
 - d. Social Media
5. Key processes, such as handling change to the contact center, customer surveys
6. Other concepts
 - a. Hosted Services
 - b. Customer Service Chain – linking customer service interactions together

- c. Expanding your reach with remote agents ("The long tail" concept)
- d. Deep Analytics and Simulation

During and after the presentation, UltraVox would like the client's thoughts regarding the presentation, and see what could apply at the client and what would not be a fit.

High Level Classification & Recommendations

After the initial meetings, UltraVox would provide any initial observations, and recommendations:

1. Describe initial thoughts
 - a. Identify any clear observations regarding opportunities for change and improvement
 - b. Identify any initial thoughts of future technologies worthy of consideration
2. Preliminary thoughts on classification – Communicate, if possible, where the client might fit in the Capability and Maturity Model

Onsite Discovery and Tour

The onsite visit will allow for much more detailed view of the client's contact center technology, other related technology, and the contact center's use of the technology, as well as the client and customer expectations.

Some items may be added or removed, and time estimates are approximate, and can be adjusted as names are added, and roles are better understood. When there are multiple meetings in a day, there will need to be time in between, which is allocated to complete notes from the previous session and prepare for the next session.

Analysis and Classification

UltraVox will analyze the information provided, and assess the capability and maturity of the contact center. It is important to note that not all contact centers need to score highest in all technology areas. This is because some technologies themselves are not yet very advanced (e.g. use of Social Media in the contact center), or the contact center doesn't need the highest level of sophistication (e.g. Workforce management for small agent populations, or screen pop for contact centers with long interactions).

The capability and maturity of the contact center will be examined primarily from a technology perspective, but UltraVox will also monitor for possible improvements to processes.

Recommendations and Roadmap

UltraVox will prepare recommendations and a roadmap in a report as well as a slide deck presentation on PowerPoint. A presentation will be given remotely via WebEx, or possibly on-site.

A final report, with any suggested adjustments from the presentation, will be delivered shortly after the presentation.

Deliverables:

1. Recommendations and Roadmap presentation and discussion
 - a. Overview of findings & analysis
 - i. Summary of findings
 - ii. Determination of the client's stage in the Capability Maturity Model
 - iii. Determination of the client's recommended stage
 - b. Recommendations regarding technology and how it addresses goals and capability maturity model future stage
 - i. Look at the different technology components within the contact center application, and identify which ones could benefit the client
 - ii. Identify how they would assist in meeting the corporate goals
 - iii. Identify budgetary cost estimates
 - iv. Suggested implementation Roadmap & timeline
 - c. Discussion regarding findings, recommended adjustments from the client
2. Recommendations and Roadmap report
 - a. More detailed document with the same elements as the presentation
 - b. It is possible that changes to the final report would contact center after the client's participation in the presentation

About UltraVox Consulting

UltraVox Consulting is a business consulting practice dedicated to connecting people through empowered technologies. UltraVox specializes in providing targeted strategic and tactical consulting programs in business process and business development starting with the contact center. We have extensive experience supporting organizations move to the latest in technology that not only improves their overall agent efficiency, but their customer experience and satisfaction as well.

Our services are designed to step through each phase of planning, executing and delivering business service. The UltraVox project methodology recognizes the unique complexities of the contact center environment, aligns operational practices with agency vision, mission, business objectives and planned results, whether its 1 phase or from beginning to end.

As opposed to direct sales representatives, UltraVox works for you. We are solution-agnostic. Our primary concern is the long-term relationship with you. Thus, we match the right solution at the right price for your current and future operating state. We offer unbiased insight and another layer of service and support post-implementation. In an industry notorious for low satisfaction ratings, another layer of service and support is a very valuable component to our relationship.

We deliver exceptional value in every engagement by:

- Putting our customer's needs above our own interests
- Providing knowledge and innovative ideas
- Bringing decades of experience to our clients
- Understanding the diverse vendor landscape and their strengths and weaknesses