CCAAS CUSTOMER
CONVERSATION STARTER

01. Are there any vendors and solutions you are already considering or have spoken to?

02. Describe your current Contact Center environment and what, in a perfect world, would be your end goal? (eg. Migrate premise to cloud UC & CCaaS for best of breed approach; CCaaS overlay, etc).

03. Do you have a contract or term with your current vendors? When does it expire?

04. a. What's you current phone solution?

- 8x8
- Avaya
- Cisco
- Mitel
- RingCentral
- SIP
- TDM
- Other (_____)

b. If premise based, are you looking to move your phone system to the cloud? (If yes, please coduct UC questionnaire)

05. a. How will agents answer calls?

- Softphone
- MS Teams
- Handset

b. If you need hard phone lines, how many will you need for each department? How many will you need for the general office areas such as conference rooms or outside of the office for those that are remote? Do agents need to transfer calls to non-agents inside your company?

06. Who currently performs any MAC (move, adds & changes) requests?

07. What are you using for your connectivity and voice today?

- DS3
- Internet
- MPLS
- PRI
- SDWAN
- VPN

08. Let's talk numbers

a. How many Contact Center locations, domestic and international, do you have and where?
b. How many Contact Center seats required?
c. How many Supervisor seats required?
d. What is your current call volume (inbound/outbound) per month?
e. How many digital interactions are you responding to per month?
f. Do you have remote agents? Is so, how many and where?

09. Do you have today, or plan to have in the future, agents working remotely? Would they use company supplied or their own devices?

10. Will you need concurrent or named agent model?

11. Do you require any of the following?

- Call Recording
- Speech Analytics
- Self-Service
- Quality Assurance

12. Are you using or interested in Omnichannel? Which channels are you needing?

- Chat
- Text
- Email
- Chatbot
- Social Media: Facebook, Instagram, Twitter, Linkedin, Whatsapp, other

13. How do you manage staffing and scheduling of agents? Is it done in a spreadsheet or do you have a WFM tool?

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NOTES

14. Are you using or plan on using any of the following? (Record details on next page or in your notes if necessary.)

- Customer feedback and surveys
- Workforce Management
- Workforce Optimization
- Workforce Engagement
- Outbound dialing campaigns
- Reporting/Analytics/Business Intelligence
- Artificial Intelligence (AI) (eg, Bots, Self-Service, Virtual Agents)
- Natural Language/Speech Enabled IVR
- Speech Analytics/Transcription
- Third-party integration (eg. UCaaS, CRM, etc)
- Callbacks to save caller's place in queue
- Embedded CTI/Screen Pops
- Skill based routing
- Realtime Dashboards
- Voicemail (type and how many)

15. a. Are you using a CRM/ERP/EHR/Case system today? If so, which?

- Microsoft Dynamics
- Oracle
- Salesforce
- Zendesk
- Zoho
- Other (_____)

b. Do you have any internal systems to integrate with? Are they API-enabled?

15. Do you have any Compliance requirements?

- CCPA
- FDCC
- FEDRAMP
- FINRA
- FISMA
- GDPR
- HIPAA
- HITRUST
- ITAR
- NERC
- NIST
- NY DF
- PCI-DSS
- SOC2
- SOX
- TCPA
- None
- Other

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