Customer Requirements Capture Guide

Introduction

This page gives guidance on what information you should capture from your customer before you begin your Horizon Contact build. This document assumes the customer is a greenfield site, i.e. has not deployed a contact centre before. If you are migrating from an existing contact centre solution, you can use this document as a guide, but you may well find that some of the steps have already been planned for you and you therefore have to think about migrating existing processes and assets.

By paying mind to the elements in this guide, you can provide the maximum value to your customers and ensure that the software is used to its greatest advantage.

Assets

Connectivity

This assumes that you have competed a site survey and/ or you know your connectivity is sufficient for the traffic you wish to pass between yourselves and Gamma. In 2020 it became important to think about the consumer connectivity your customer's home-based staff and agents have access to and perhaps supplement this with business grade broadband.

Users

There are three types of user currently within Horizon Contact

Agents (Voice and email) (Chargeable)

This user requires a Horizon Premium licence before the agent licence can be applied. The usernames you choose for Horizon will be propagated to Horizon contact. Each agent can handle both voice and email and you will need to consider whether agents have DDIs or just use extensions. If agents will have DDIs you will need to ensure enough numbers are purchased in the Gamma portal.

Do you need call recording for agents? If so, what retention period will be suitable bearing in mind data protection legislation.

Supervisors (Chargeable)

A supervisor also requires a Horizon Premium Licence before this licence type can be assigned. Supervisors can also perform the role of agent so in a small contact centre you may make one of your agents a supervisor. It is important to understand which agents will be managed by which supervisors.

Customer Level Administrators

An administrator does not need to be either an agent or a supervisor but will need a Horizon user to be provisioned. You need to understand what tasks you will perform and what tasks your customer administrator will perform. You should document these so that a clear delineation is created up front. This user type will typically perform management tasks but won't necessarily monitor the contact centre KPIs or be responsible for agent performance.

Numbers

Your contact centre will require at least one number to function and may have several. In addition to this you will need to understand whether agents and supervisors will require a DDI or will just use extensions.

Core Contact Centre Information

Administrative Information

Break Reasons

Break reasons affect whether agents are available, so discuss this with your customer. Lunch breaks might be interruptible by the supervisor for example, whereas training might not be.

Holiday Lists

You can create Holiday Lists at Partner level and flow these down. You can create different lists for the different public holidays that different countries observe. It is worth checking whether your customer operates different opening hours on public holidays.

Time Ranges

You will need to know the opening hours of your customer’s contact centre and these can be set differently for each day of the week. This information can be used to direct interactions appropriately, e.g. redirect calls to a mobile outside of office opening times. You can also capture any specific days with different opening hours

Service Information

Skills Groups

You will need to place agents into groups for them to take interactions and these are usually formed of collections of agents with similar skillsets or job types, e.g. broadband engineers or booking agents. Therefore, you need to get a list of the different skill groupings the company wishes to use. In smaller contact centres you may only have one group, but you can still use the skill (star) rating to reflect the different levels of experience within the team.

Agents with a higher skills rating will be offered interactions before other agents. If you don’t wish to use this method of distributing interactions, you can set all of their skill level the same.

Queues

You will use interaction flows to place interactions into a queue, which will in turn be picked up by agents based on which group they are in. Queues are a way to organise the calls that come into the business. The strategy for choosing how many queues depends on the business and how they are organised.

For example, for a business with national coverage, you may create queues based on regions. This keeps the number of calls per queue manageable because some queues may have multiple regions where the population is sparse and other queues might have a very small region where population density is high.

Another example is segregating by product, e.g. fixed connectivity and mobile. This enables different rules and KPIs to be in place for different functions and also aides with reporting so you can see the number and type of interactions for that product group.

You will need to understand how the business functions to enable you to plan the number and function doe each queue.

Some of the specific parameters that can be set at a queue level (please see individual sections for more information):

Interaction classifications

Agent scripts

Queue recording

Which skill groups are offered interactions for this queue

Whether the queue can make an outbound call and the number that is presented from this queue

What announcements are played

What KPIs are set, e.g. how long should calls be in the queue before they are answered

Advanced settings (check the section on Advanced Setup Items)

Audio Announcements and Music

You will need to create a variety of audio announcements for calls coming into Horizon Contact and these are usually set up per queue.

For example, you may have a welcome message that plays to all callers, but then you may have a specific message for callers once they are directed to a queue and you may wish to create further announcements to play during call flows events such as DTMF menus. You can upload MP3 files or use the text to speech functionality which uses Nuance to create natural sounding announcements.

It is best to plan what announcements you need to create and what music you wish to play whilst you are planning your call flows and before you start building them.

You can upload any music you have a licence for in MP3 format.

Interaction Flows

Interaction flows are one of the most powerful elements of contact centre software and can therefore be quite complicated. However, Horizon Contact makes it relatively easy to create interaction flows in a graphical user interface.

When you are planning your interaction flows you are essentially thinking about how to direct a customer to an agent with the least steps for the customer, since this is where customer loyalty can be lost if the their experience is poor.

Call flows

When building call flows you can route calls in a variety of ways, but you should reference how the business is set up or how you intend to set the business up.

If for example you have a simple case of managing calls to sales queue, your key considerations may be just to get the customer to the sales queue as quickly as possible and so you have a minimum number of routes or branches. You may just check whether the caller is calling in business hours and if not push them to voice mail.

Familiarise yourself with the various nodes and then sit down with your customer and ask lots of questions about how calls typically come into the business. Understand where the peaks of calls sit, whether you wish to use or capture any information from the caller before they have spoken to an agent, e.g. if you have queues based on region, you could send all calls using different area code lists to different queues.

Draw this up on paper or using an application such as Visio before you attempt to create the flow in Horizon Contact. This will prepare you as to what other assets or information you will need to gather before creating the flow.

Email Flows

Email flows follow similar principles, but in many ways are easier because there are fewer routing options for email. However, you could still provide benefit by using rules such as branching on subject text to direct emails to queues automatically.

Area code and Number Lists

If your customer wishes to route calls based on the calling number or the calling area code then you will need to collect this information and enter it into the appropriate place within Horizon Contact.

Agent Assets

You can provide the following to assist agents in answering interactions

Text Blocks for Email

If there are standard pieces of text that the company uses for email, e.g. a standard greeting or SLA information, then you can store these in Horizon Contact, and they will be available to agents answering emails.

Attachments for Email

You can control the attachments that agents can send to their customers and provide a library of different files to cut down the time required to answer emails with the correct version of the document to hand. You should ask your customer to provide a list of documents they might with to use in a document library

Agent Scripts for Voice

If agents need to collect the same information for all calls that come to the queue they are assigned to you or the customer can create agent scripts, which prompts the agent to ask questions and records the answers in the internal CRM

Customer Information

Horizon Contact currently integrates with Salesforce and Microsoft Dynamics, however it does have its own CRM where customer records can be stored.

The Horizon Contact CRM can contain several custom fields which can be tailored to the needs of your customer. You should discuss the data your customers wish to store so that the custom fields can be created in advance.

Data

Classifications

These are otherwise known as wrap up codes and are added to an interaction when it is completed by the agent. Classifications are added to a queue from this master list. Therefore, it is important to understand from the customer how they want to categorise interactions, so that they can report on them later.

Wallboards

Wallboards can be displayed on big screen within the contact centre to ensure that the KPIs are available to everyone at a glance. Different teams may have different requirements, likewise managers may wish to see an overview of all teams. Who are the key users for the wallboards and what information do they want to see? Asking these questions will allow you to quickly build the appropriate wallboards.

Reports

You should find out which users will require reports, what information they wish to see and how regularly they wish to receive the information. Reports can be exported as a CSV, which may be useful if the customer wishes to use other software to format and present the data.

Reports are one of the most useful elements of a contact centre package and so you should take time understanding requirements and ensuring that the reports answer the questions about the customers critical KPIs or pain points.

Contact Reports

These are special types of reports for looking at surveys, script completion and email template usage.