

# What to look for in modern contact center solutions

Checklist of must have AI-powered capabilities to ensure you can deliver effortless, omnichannel experiences



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# Delivering effortless customer experiences

Look for capabilities that support your customers' preferences and help you consistently deliver superior customer service across channels.

## Self-service capabilities

Help customers help themselves.

### Does the solution provide:

- Interactive voice response (IVR)** trees that help customers solve relatively simple or common issues without needing to involve an agent. Note, some solutions:
  - Provide advanced context-based phone trees that are better able to hone-in on customer requirements and increase the relevance of responses.
  - Limit capacity (number of ports) – so look for solutions that can scale with your needs.
- Intelligent virtual agents** that enhance self-service, with support for:
  - Both digital and voice bots to enable customers to interact with you in the channel they prefer.
  - Natural language processing (NLP) to support regular communications (in human language) with customers.
  - Escalations to human agents if needed – ideally the full context of the interaction will be included to ensure agents understand what has transpired so far and can pick up right where the bot left off for a seamless experience.
- Actionable insights** into the effectiveness of self-service containment, so you can continually take steps to improve your service capabilities.

## Omnichannel engagement

Ensure customers receive a consistently good experience within the channel of their choice.

### Does the solution provide:

- Support for multiple digital channels** within the same system – look for solutions that can handle all the channels you want to use. This will help you avoid having to deploy and manage multiple point solutions, which can end up creating data silos and fractured experiences.
- The ability to identify and merge digital identities into a single profile for a **unified view of the customer**.
- A **unified view** of all the information you collect from and about your customers to help you track the ongoing efficacy of each and every interaction. Ideally, the solution will help you:
  - Measure relevant Net Promoter Scores (NPS) or other industry standard metrics across your channels.
  - Report on all interactions across all channels, so you can identify and proactively address opportunities for improvement.

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## Intelligent routing

Give customers what they are looking for by routing questions or issues to the information and people best equipped to help them on first contact.

### Does the solution provide:

- Skills-based routing** with proficiency ratings to connect customers to the agent best equipped to help them.
- Data-driven routing** through open application programming interfaces (APIs) that can retrieve data from back-end and customer relationship management (CRM) systems to make smarter connections.
- The ability to connect the customer to the **last agent** to help them, if available, reducing the time needed to gather basic information for faster problem resolution.

# Improving agent experiences and productivity

The contact center solutions you deploy should help you keep agents motivated and productive, regardless of where they are located, to consistently deliver high-quality, personalized experiences that improve first contact resolutions and overall satisfaction.

## Unified toolset

Ensure agents have all they need at their fingertips to best help customers.

## Does the solution provide:

- A single application** with a unified view that agents can access from anywhere to:
  - Easily respond to customers across all your voice and digital channels (e.g., Facebook, SMS, email, chat, in-app messaging, etc.).
  - Deliver consistent customer experiences, leveraging customizable scripts with access to searchable knowledge bases, websites, and workflows.
  - Receive real-time AI coaching and guidance, based on NLP, on every call.
- Ready-made integrations** with key CRM tools and other contact center systems of record, like Salesforce, Zendesk, Microsoft Dynamics 365, ServiceNow, and Hubspot, to create immersive agent experiences that simplify and accelerate workflows.
- Simple collaboration tools** – e.g., messaging, video meetings, and call options – that allow agents to easily:
  - Use video, screen sharing, or co-browsing to deliver a rich communication channel for problem solving.
  - Work with other team members to better answer customer questions.
  - Escalate when necessary to bring in an expert or connect the customer directly to an expert when needed to resolve an issue.

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## Workforce engagement

Keep agents happy and engaged to optimize the overall performance of your contact center.

### Does the solution provide:

- The ability to monitor (and potentially record) **all agent interactions** across all your channels, both voice and digital. Note, some solutions limit the number of calls that can be recorded or monitored; others limit the number or types of channels they can monitor, so be sure you have the breadth and scale you require.
- AI and machine learning** that provides recommendations on staffing for all channels to:
  - Optimize agent schedules.
  - Maximize coverage.
  - Minimize idle times and customer queues.
- Tools that allow you to **measure and track** agent satisfaction and take steps to reduce churn by:
  - Making it easy for agents to trade shifts, bid for days off, plan for training, and more, without impacting the quality of service.
  - Automating tasks to streamline work and provide end-to-end productivity improvements.

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## Onboarding and coaching tools

Help contact center supervisors get agents up and running fast and continually improving.

### Does the solution provide:

- Remote training and onboarding** (video-enabled curriculum), along with agent scripting for ongoing enablement.
- Real-time speech and text analytics** that enables supervisors to spot customer trends and issues and change agent behavior in real-time with:
  - **‘Whisper’ capabilities** that allow supervisors to contact agents to provide guidance/pointers without disrupting the conversation with the customer.
  - **Intervention ‘barge-in’ capabilities** that allow supervisors to join the interaction to assist.
- AI-powered quality management** and **conversation intelligence** that can identify agent performance gaps for continuous improvement.

# Streamlining operations

You need contact center solutions that can grow and adapt with your needs to ensure you can efficiently and effectively meet your customers' ever-changing expectations.

## Reporting and analytics

Tracking and interpreting performance across all channels is critical to providing ongoing business improvement.

### Does the solution provide:

- Real-time insights** into what is currently happening in the contact center, with:
  - The ability to customize dashboards with flexible report formats (visual charts, data tables, etc.) to monitor live performance.
  - Real-time alerts when critical events occur.
  - A single interface to monitor all voice and all digital interactions.
- Historical reporting** that show trends over time, including:
  - Prebuilt reports to track common key performance indicators (KPIs), such as average handle time (AHT), over a set period of time.
  - The ability to easily build customized reports tailored for specific business needs.
- Conversation intelligence** to analyze what customers and agents say, including:
  - Keywords and competitor mentions and how often they appear.
  - Sentiment analysis to determine whether customers are happy with their experience.
  - Key areas of customer frustration.

## Good return on investment (ROI)

Start to transform your contact center from a cost center to a profit center by efficiently maximizing every customer interaction to optimize outcomes.

## Security and compliance

Security is paramount, so it's important any solution you are evaluating can protect your customer data and maintain security and compliance.

### Does the solution provide:

- Cloud-based deployments and integrations** that reduce:
  - Capital expenses (CapEx) by eliminating hardware outlays, as well as upgrades and maintenance costs.
  - Ongoing operational expenses with a unified solution for unified communications as a service (UCaaS) and contact center as a service (CCaaS) capabilities (single pane of glass, smart routing, etc.) that streamline the visibility, communications, and management of interactions across channels throughout the lifecycle of your customers.
- Call deflections to digital channels** with intelligent virtual agents that enhance lower-cost self-service capabilities and reduce wait times and abandoned calls. These bots can improve their efficacy by leveraging:
  - NLP to make it easy for customers to request and receive the help they need.
  - Existing content, such as websites and knowledge bases for fast, accurate responses.

### Does the solution provide:

- Certifications that meet the compliance requirements** that are relevant to your business, such as Payment Card Industry Data Security Standards (PCI DSS), Health Insurance Portability and Accountability Act (HIPAA), and system and organizational controls (SOC), among others.
- Best practice security deployments and operations** for cloud applications running in the public cloud.
- Validated results from regular penetration testing and assessments** performed by top security talent from third-party providers designed to identify and remediate vulnerabilities and protect customer data.

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