



Gaining support for contact centre development a key to success

Intuitively contact centre managers know that outlays on a workforce management (WFM) application, or natural speech recognition technology or computer telephony integration (CTI) system, will bring the company commercial benefits that would justify the expenditure.

Contact centre managers are faced with the reality of needing to “spend money to save money” as a way to improve the contact centre’s efficiency and effectiveness. Intuitively contact centre managers know that outlays on a workforce management (WFM) application, or natural speech recognition technology or computer telephony integration (CTI) system, will bring the company commercial benefits that would justify the expenditure. The trick is in convincing others in the organisation, and getting them to support the project.

The key to convincing your colleagues and boss to support the project lies in a well prepared and well socialised business case. Effort must be applied to both the preparation and socialisation to reap success. All it requires is adherence to some simple guidelines.

Preparing the business case

The first step is to understand the company’s process and timeframe for capital expenditure approval and work within it. Some organisations require capital expenditure projects to be listed in the budget before a business case will even be considered for approval, whilst others will consider them as they are submitted.

Whatever the company’s process, planning your time horizon is critical as capital expenditure projects, unless they are an emergency (e.g. the contact centre’s PBX has died), very rarely gain approval in days – weeks, and sometimes months is typical. And this is after the time you have spent preparing and socialising the business case!

Understanding the process also means identifying the key players in the organisation and their role in the approval process. Which managers have the delegated authority to approve the expenditure? Who will be the sponsor? Who are the stakeholders and influencers? These key players are the ones with whom you will need to socialise your business case.

A robust case will include an analysis of the financial, as well as discussion of non-financial implications, for the capital expenditure and typically includes:

- The capital funds required and the timeframe for expenditure (e.g. all at once or in stages).
- The revenue implications expressed in financial terms. For example, if installing a new WFM application means you will free up staff resources to be applied to outbound sales activities, what new additional revenue do you expect these staff will generate?
- The cost implications expressed in financial terms. For example, if installing a new CTI system means contact centre staff can reduce the average duration of each transaction, what does that translate to in value?
- Non-financial implications are often customer- or staff-related and can be difficult to quantify, but still worthy of mention in the business case. For example, an application which makes it easier for staff to undertake their work can result in improved morale and reduced stress.
- Including scenarios in a business case shows wider issues have been considered and can sway reviewers when there are several options available. For instance, the benefits of the additional cost for an enhanced version or additional modules of a new application versus the standard version.
- Discussion of risk assessment and contingencies in a business case shows that likely issues and their mitigation have been considered. Risk assessment could also include the potential costs of not undertaking the project.
- The measures of success of the project, during its time schedule and ongoing.
- The resources required to deliver the outputs, and ongoing resources for support,

once it’s completed.

Socialising the Business Case

Oddly, socialising the business case starts before the first draft is even prepared. This involves an initial sounding out of the key players in the organisation to introduce the proposed project and to ascertain their interest and potential support. This is a good opportunity to also seek their input and establish any issues and concerns they may have about the proposed project, and what they would like to see included in the business case. Issues and concerns can then be addressed in the business case itself or removed before the case is submitted for approval.

Once you have undertaken the initial socialisation, keep the key players in the loop as you are developing the business case. For instance you might do this by providing preliminary drafts for review and comment. If you can, it is worthwhile meeting with people face-to-face to discuss and deliver the draft of the business case for review, as you may find that emails and voicemail messages get lost in the activity of their busy week.

Hopefully you will use this column as a catalyst to launch your new initiatives. Why watch others in your organisation getting their new projects approved when your good ideas can bear just as many benefits?

With application, you can show your leadership team that you have the discipline, the breadth of mind and critical thinking skills to bring about positive change and development. You will also find that initiating new capital expenditure and its outcomes can be very satisfying.

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