CallMiner Eureka

Best Practices Series

Planning for Success:

Nine Guidelines & 153 RFP Questions for a Customer Engagement Analytics (Formerly Speech Analytics) Solution

RANKED #1

in

Customer Satisfaction

among

SPEECH ANALYTICS VENDORS

Independent Analysts Surveys

The way we communicate as a society has changed profoundly in the last 10 years and though voice communications is still the dominant media, it is clear that email, text, chat, twitter and other forms of social media will continue to play a larger role in both personal and commerce interactions. In response, traditional call centers are transforming from a voice only environment to Omni-channel customer engagement centers. While the way we interact may be evolving, the primary objectives of optimizing contact interactions such as increasing revenue, improving customer satisfaction and mitigating risk remain constant. Automated Customer Engagement Analytics (formerly Speech Analytics) that captures 100% of contact interactions and produces results that impact revenue, provide actionable insights and trends data and improve compliance is no longer a "nice to have" but rather a "must have."

Since the level of sophistication and functionality of these systems has changed, so must the RFP questions to ask when selecting a Customer Engagement Analytics vendor. The following guidelines and RFP questions are meant to assist you in drafting a Request for Proposal that will ensure your selected analytics vendor can provide the type of Omni-channel, true journey solution that will meet your organization's current and future needs.

Plan for Success: Best Practices

Employ these best practices to ensure the automated Customer Engagement Analytics solution delivers actionable results quickly.

Start Simply.

Begin by bringing up one or two customer engagement contact centers, then bring up the remaining centers. This strategy minimizes the risk and shortens the timeframe to deliver business intelligence. Both help solidify project success.

Generate a Clearly Defined Plan of Action.

Don't deviate from it. The fastest way to derail an implementation is to add additional features, functionalities or reports that have not been previously scoped. Scope creep is the #1 way to fail by heightening expectations and under delivering. Keep scope in check and you will achieve productivity much quicker. Importantly, limiting scope helps adoption within organizations. By attempting to do too much too soon, organizations become overwhelmed and have a tendency to abandon their early enthusiasm for the initiative.

Engage the IT resources in the Automated Customer Engagement Analytics deployment and plan the project accordingly.

Whether you are planning a premise or cloud hosted design for the analytics solution, make sure the IT team is actively engaged and participates in the planning and deployment process. If you are like a large majority of companies deploying automated analytics and leaning toward hosted cloud solutions for cost and speed to deployment drivers, the IT resources should be involved in the elements associated with identifying and formatting the audio and metadata to be mined along with configuring the external network connections/firewalls to support the secure data file transfer to the cloud hosted environment. If the organization's policies or security requirements dictate a premise based solution, the IT team will play an even greater role in the infrastructure design, acquisition, space planning and maintenance of the interaction analytics provider's recommended hardware design.

Focus on Quick Achievable Wins First. Nothing can bog down the success of a new initiative like "trying to boil the ocean" with your project right out of the gate.

Focus initially on short-term objectives to create a baseline. Define objectives and measurable areas where automated Customer Engagement Analytics can have an impact quickly and demonstrate early success. For example, focus on reducing call wrap activities via automation or other operational efficiencies during the implementation phase of a project so value can be realized when you go-live. This approach helps your team gain experience with creating, actionizing and reporting results plus provides momentum to enable the adoption of automated analytics on a broader basis in your organization to improve more areas of the business.

Mine 100% of your interaction data.

Begin the automated Customer Engagement Analytics implementation with as much of the sites' audio recordings (and other channels if included) as the budget allows. Statistical certainty improves as you increase the percentage of conversations mined and analyzed.

Connect the Back Office to the Front Office.

Create an executive cross-functional team that regularly reviews the results from the automated analytics application. Management will undoubtedly discover actionable information that requires the business to consider new initiatives to improve business processes. Sharing analytics results can accelerate return on investment by driving business intelligence beyond operations or quality management to the executive suite, sales and marketing, engineering, legal and human resources.

Act upon the New Business Intelligence.

Adopt processes that enable the organization to act quickly on new information gained from automated Customer Engagement Analytics. Since new intelligence from automated analytics is delivered in near real-time, be prepared to quickly learn and adapt to changing dynamics.

Dedicate a Business Analyst(s).

There is no substitute for an experienced business analyst(s) who will use the business intelligence extracted from automated Customer Engagement Analytics to recommend process improvements benefitting the entire organization. Relying solely upon the resources in the contact center to monitor themselves and apply streamlining or cost cutting measures, seldom yields optimum results.

Employ Change Agents.

Technology is not a panacea, nor is the business intelligence it generates. To achieve ultimate results, processes, people and metrics must also change.

Prototype RFP Questions

If you are planning to issue an RFP, consider asking these questions to all vendors. You will be surprised at the answers. For each section, the most important questions are in **boldface type.**

Business Value

1. Describe the philosophy regarding Customer Engagement Analytics and how the solution delivers on it.
2. What differentiates the solution from other pure play contact analytics companies or WFO shops that offer multichannel analytics?
3. Provide examples of case studies and results of the deployment of the solution.
4. **What ROIs can be typically achieved with the solution? Where can we expect the biggest ROI? In what time frame can we expect to see results?**
5. **Describe the standard offering - what is included in the solution? What are additional / optional components (and associated cost)?**

Ease of Use

Reports & Reporting

6. What reporting capabilities are included in the out of the box solution?
7. Can users create their own reports?
8. Can users turn any visualization in the solution into a subscription report?
9. Is contact metadata available for use as report parameters?
10. Can reports be scheduled for automatic delivery to email or saved on a network share?
11. In what formats can reports be exported?
12. Are both text and graph reports offered?
13. What statistics can be displayed in reports?
14. Can calls be played directly from reports?
15. What data is available when reporting on average duration and silence on calls?
16. **What means of customer journey reporting come standard in the platform? Does this include visualization?**

Data Output

17. **For the reports and the underlying data, do you provide integration and API capabilities to third-party analytics software? If so, please describe.**
18. Please provide examples of how your customers have been able to leverage the analytics output provided through the API with information in their Business Intelligence tool or information in their Data Warehouse.
19. Do you have some recommended best practices for data integration?
20. Do you provide data integration services?

Ad Hoc Analytics

21. What analytical tools are provided aside from reports?
22. **Can a user create ad hoc views of data (visual and tabular) across any dimension or measure? Describe.**
23. Provide a list of dimensions and measures available for ad hoc analysis.
24. Provide a list of visualization types or methods available in ad hoc analysis.
25. Can a user identify correlations between different dimensions and measures of data? If so, how?
26. Do analytical dimensions support hierarchy? Describe.
27. How are the different types of metadata utilized? (i.e. a continuous measure, such as date/time, versus a discrete measure, such as agent).
28. Does the solution offer an ad hoc search function? On what data is this analysis based (transcript, pre-defined terms, keywords, other)? ”How many different ways can the data be represented in search output results?
29. Can the number of phrases shown in the search cloud be expanded? Can they be eliminated?
30. **Is there a limit to the number of search terms in a single search? If so, what is the limit?**

Categorization

31. Does the solution include any pre-configured content or categories delivered with the product “out-of-the-box”?
32. How is categorization performed?
33. Can new categories be created easily by the end user? Please describe the process in which new categories are created by the end user.
34. On average, how long does it take to create a new category?
35. Does creation of new categories require re-processing audio to categorize old calls? In other words, can audio containing words or phrases of interest be found from categories after recognition is complete – or does the audio have to be re-run through the recognizer?
36. **What method, beyond using search terms, can be used to ensure category accuracy and removal of excess false positives?**
37. Can categories be hierarchical? Is there a parent/child category relationship that is user definable? If so, describe.
38. Can users change the definition of existing categories?
39. Describe the methodology of categorization including the top five best practices.
40. Can user-defined KPI metrics be included as available data in the application interface and reports?
41. Describe category accuracy rates that you have experienced with customers, including false positive rates, please include the test methodology used to establish the rates.
42. Describe how you would go about building the top call drivers?
43. Is your system able to attribute multiple call drivers to a call or set of calls?
44. Is there a limit to the number of categories which can exist in the system? If so, what is the limit?

Search

45. Do search terms need to be pre-defined?
46. How long does it take to search a single word in 1,000,000 hours of audio? A four-word phrase? Specify number of servers and cores to complete the search in the time indicated.
47. What type of logic is available in determining search criteria?
48. Can searches be saved and be scheduled to automatically run and deliver results?
49. Describe the variables which will impact search response time.
50. Can a user distinguish search results or identify calls of interest without playing back calls or portions of calls? How?

51. Can a search use previously defined searches or categories in the search language? Describe how.
52. Can a user see words spoken before and after the search term?
53. Can a user play only the portion of the call in which a search hit occurred?
54. How does the search application distinguish between homonyms or words that contain other words?
55. How does the search application identify results for words that have multiple different pronunciations?
56. Describe the options provided for filtering search results.
57. Can users filter searches via category hits? Via non-hits?
58. Describe how the system can be used or modified to find words in calls that the system is unaware of?
59. Can users create and maintain their own searches?
60. Can users schedule searches to be run automatically at set time intervals and the results be sent by the system? Can the results be shared with others? How?
61. Can searches be used as part of a category definition?
62. Can search results be displayed in a report? In visualizations through graphs?
63. Is there a tool to ensure quality assurance on search and category terms? Describe.
64. **Does the solution allow for the ability to analyze call flow and its correlation to call outcome?**
65. **Does the system support manual tagging of calls? If so, can new searches on old data be run against the new tags?**
66. **Does the solution allow for the comparisons of different call sets / search results to highlight differences / characteristics of the different call sets? If so, how?**

Discovery Root Cause

67. How does your solution facilitate identifying root cause analysis?
68. Describe how the system discovers new topics, words and or interesting phrases without knowing them beforehand.
69. Does the system capture every word of every interaction?
70. Describe the statistical method of frequency analysis used to uncover trends.
71. Can changes in the frequency of the use of a word be tracked? Describe how. Is this for all potential words, or only for words pre-defined via word lists, searches or taxonomies?
72. Can users drill into the relevant calls based on the results of frequency or clustering analysis?

Multichannel/Omnichannel Journey Analytics

73. **Does the solution allow for the ability to analyze a customer journey (multiple calls and other types of interactions by the same customer)?**
74. **What other types of customer journey interactions that you can analyze? Specifically are you able to process the following:**
    a. **Voice conversations**
    b. **Chat**
    c. **E-mail**
    d. **Social Media**
    e. **Customer survey verbatim**
75. Are all customer interactions searchable through the same interface in the same database?
76. How does the licensing model reflect or cater to different forms of customer interaction?
77. Are all of the interactions for the different channels being delivered through the same transmission mechanism?
78. Can different data retention periods be established for the different types of interactions being mined?

Roles & Permissions

79. How does the platform control user access?
80. Can user rights be established to provide access to only certain types of interactions to specific users or groups?
81. **Is there a persona-based permissions capability?**

Performance Feedback and Scorecard System

82. Does the system have an automated scorecard system?
83. Does the platform have manual scorecard capability?
84. Can scoring be annotated or modified?
85. Does the platform provide for automated agent performance feedback?
86. Does the platform provide a supervisor dashboard?
87. Does the system provide dashboard persona-based and individual views?
88. **Can users build key performance metrics to track all calls using categorization data and metadata? If so, how is this accomplished? Does this require vendor engagement?**
89. Please describe how the solution can drive information / feedback to the contact center organization to drive increased performance / success. Are there "self-service" mechanisms for the end users?

Real-time Analytics

90. Does the platform include real-time analytics capabilities? If so, please explain the platform.
91. What is the underlying technology of your real-time monitoring platform? Does it differ from your post-contact analytics platform? If so, how?
92. Does the real-time platform include a supervisory alert panel and if so, what is included in the supervisor view?
93. Please explain your administration function and the degree of customization that can be done by a customer?
94. **Does the real-time solution include agent alerts and guidance? Please detail what is included.**
95. **How are alerts defined?**
96. **If agent alerts are provided, are there any limits to the number of alerts possible?**
97. Does the real-time solution include reports and if so, please detail those reports?
98. Do you have any "Out of the Box" Solution/Use Case packages available? If so, what are they?

Architecture & Security

Architecture

99. What type of speech engine do you use? Is it phonetic-based, a Large Vocabulary, or something else? Please describe.
100. What call recording systems does the solution integrate with out of the box?
101. What call metadata is captured out of the box?
102. **Does the platform provide speaker separation on both stereo and mono recordings?**
103. Can the system be extended to include additional metadata asynchronously? Will this data be available in the standard reports without customization?

104. Are there any limits to the amount of metadata that can be captured per interaction?
105. Does the system measure silence in or around conversations? If so, how?
106. What acoustic measures can the system provide?
107. Is a separate copy of the audio made/stored in the system required in order to process it?
108. Is the data stored in an industry standard, non-proprietary format? If so, what versions, and how much support is available?
109. What is the total data footprint (including call text/data, any indexes to support search, any separate copies of audio made to support mining) of the solution for 20,000 hours/day at 13 months of retention?
110. What allows/prevents the solution to scale as volume and storage increases?
111. Provide a high-level diagram of how data flows in the solution.
112. What specific features allow the solution to be enterprise-capable? Can it handle multiple sites? Multiple recording system types? Multiple sets of business rules? Analysis at both the local and enterprise layer?
113. What is the hardware footprint (sample specs for each component of the system) for a typical site mining 20,000 hours per day? How many concurrent users can this system support? How does it scale for additional concurrent users? Include any hardware or software necessary to search one year of data.
114. Describe the largest customer implementation.
115. After a call is finished recording, when will it typically be available for analysis?
116. How long is data for analysis typically retained in the solution?
117. What operating systems are supported?
118. Please list required third-party software needed for operating systems.
119. How will the need to work with audio from outsourcers be addressed?
120. Does the platform support multiple languages? Please list them and their availability.
121. Does the platform support web-based interfaces? What browsers are supported? What is required on the desktop?

Security

122. How is user authentication to the software handled? Does the system maintain its own set of user credentials or can it integrate into Active Directory? What version of Single Sign-on is supported?
123. What user activities can be logged? Are the logs accessible and exportable?
124. Can user access be restricted to specific sets of calls? For instance, segregation between departments.
125. Can our admins define and change the access rules?
126. Is data able to be stored in an encrypted format?
127. Is the solution PCI compliant? What other certifications or compliance do you hold? Please provide a report on compliance.
128. Can the system redact sensitive data? If so, describe.

Implementation

129. Describe the approach to implementation.
130. Please explain your media integration capabilities.
131. What tools are offered to assist the customer in planning, implementation, file formatting and extraction processes?
132. Please provide a typical implementation project plan.
133. How are multiple site implementations handled?
134. What IT resources are required from the customer side?
135. What is the typical duration of an implementation? (i.e. kick-off to go-live date)
136. Can metadata changes be made dynamically in the user interface or does that require vendor support?

Support & Training

137. Describe the maintenance levels and support channels.
138. What is the typical response time to a support issue?
139. Describe the training program.
140. What is done to ensure the customer is using the product to its full potential?
141. Is there a certification process delivered as a part of the training? Describe.
142. **How much additional vendor professional services are typically required on an annual basis for maintaining content as well as creating additional content? What is the cost for these services?**
143. What programs or services do you offer to assist the customer in the optimization of their analytics solution (i.e Drive ROI)?
144. Describe how the training and support allows the customer to achieve independence with regard to using the Customer Engagement Analytics solution including content creation through to reporting.
145. Beyond the company's technical support, is there a user community which can be leveraged for guidance and feedback on product usage?

Pricing

146. What is the preferred license model? What other license models do you offer?
147. How does the license model reflect call sampling at rates lower than 100%?
148. Which delivery methods do you support? (Premise, hosted)
149. What is standard in the Analytics package? What are the options and prices associated with these options?
150. What are the prices for professional service options?
151. **On average, what is the ratio or percentage of annualized professional services cost to the annualized SaaS License fees for the products (i.e. for every dollar in annual subscription license cost there is an additional dollar for professional services support).**

Product Roadmap

152. What features and functionality do you expect to introduce in the product over the next two years?
153. **What input do customers have on the product roadmap?**

If you need additional help in crafting your RFP, we would be happy to help. Please call (239) 689-6463, ext. 2 for sales and ext. 177 for marketing.

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