Establish your vision

1. Start by building your customized blueprint for customer experience success. Define what your ideal customer engagement looks like:

   - Design your ideal omnichannel customer experience solution using the CX Blueprint Builder. Select the channels, features and capabilities you need now — and in the future.
   - Review your self-generated CX blueprint, including selected features and capabilities as well as additional insights and recommendations.
   - Rebuild your blueprint at any time, if needed, to ensure you have a comprehensive view.

Share your plan

2. Identify key internal stakeholders, including new influencers and advocates within line-of-business departments who could also benefit from updated customer management and experience capabilities. Position relevant benefits for each stakeholder.

   - IT peers and leaders want simplified solutions, management capabilities, vendor consolidation and cost reductions, primarily in the areas of TCO and ROI.
   - Call center/customer experience leaders want to improve key operational metrics like call handle time, first-call resolution, and customer satisfaction rates (CSAT).
   - Sales leaders want improved customer retention that will increase repeat business and improve up-sell and cross-sell opportunities.
   - Marketing leaders are interested in customer retention, growth and lifetime value. A strong track record of customer satisfaction will positively influence brand valuation.
   - HR management will benefit from increased employee satisfaction and reduced turnover rates.

Benchmark current performance

3. Work with each stakeholder to outline current business priorities and KPIs. Determine how each department currently measures success.

   - Collect and document benchmark data to serve as your baseline for improvements and ROI analyses.
   - Validate strategic and operational goals, including any industry-specific requirements.
   - Consider each KPI benchmark and determine if they align with ongoing and future business priorities.
Establish achievable goals

4. Your blueprint captures your customer experience vision. To achieve that vision, identify specific goals and define metrics.

- Define reasonable and measurable business improvements in order to establish project goals that align to your business and financial goals.
- Run a budget analysis to identify cost savings and consider reinvesting to implement new, omnichannel features and capabilities.

Mind the gaps

5. Identify any gaps standing between you and customer experience success.

- Outline which new features and capabilities to add based on your business goals.
- Determine if you need to modify current processes or add new ones.
- Consider your professional services requirements during and after your transition.
- Plan for user adoption, training and change management.
- Determine if any infrastructure readiness is needed in advance of your migration.
- Understand which integrations are essential.
- Outline your reporting and analytics needs.
- Consider which deployment model makes the most sense based on your business needs and industry regulations.

Pace yourself

6. Create a reasonable timeline for your business. Consider taking a phased approach to implementation.

- Prioritize the replacement of current channels and capabilities, as well as any “quick wins” as part of your first phase.
- Consider adding new channels, features and capabilities as a part of a second phase.
- Group related features and capabilities, when possible.
- Make sure your timeline accounts for seasonal spikes and peak operating periods.
- Plan for employee training and change management.
- Consider IT resource needs and availability.
Gain internal support and budget

7. Assemble a compelling business case to build internal consensus and secure funding.
   - Include a consolidated, comprehensive list of business needs and technical needs, along with current performance benchmarks/KPIs and expected improvements.
   - Outline operational improvements and financial benefits, such as reduced TCO and a shift from capital expenses to operating budgets when moving to a cloud-based solution.
   - Show project timeline and phases, if using a phased approach.
   - Ensure that all key stakeholder priorities and concerns are included and addressed.

Research vendors

8. Refine your vendor list as you solidify your solution and support needs.
   - Start with broader list of at least five potential vendors, based on your high-level technical requirements, industry solution reviews and ratings, and long-term business needs.
   - Rule out vendors with critical solution gaps as you work with internal stakeholders to solidify needs.
   - Execute a formal RFP process with remaining vendors.
   - When evaluating RFP responses, ask questions or request proof of concepts in your own environment.
   - Validate vendor claims by requesting and contacting at least three customer references from within your industry.
   - Consider your future needs and ask each vendor for three years of R&D investment and a roadmap — looking two years back and one year forward — to map trends and ensure if innovation is a priority.
   - Assess each company’s financial health and longevity. Financially unstable vendors and industry newcomers are riskier choices when it comes to long-term solution viability and vendor support.

Next steps

Customer experience success is within your reach — and there’s never been a better time to innovate. With all of today’s contact center advances and new customer experience trends, it’s an exciting time to turn your vision into a reality.

Get started today. Already have a blueprint?

Build your blueprint Build your business case