



How to build a call center from the ground up

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A guide to setting up your call center and choosing the phone system to best suit your business' needs.

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Introduction

Setting up a call center for your business is an investment of both time and money. In order to navigate this operation as well as possible, here is a guide to help you get off on the right foot when building a call center from scratch. More precisely, this ebook will help you navigate the selection and setup of your call center's keystone: its phone system.

Businesses are consumers, too, and in recent years call center software has become less prohibitively expensive and more available to companies of any size and activity. Due to customer service-focused SaaS providers making their product more affordable, accessible, and easy to adopt, it's easy to be overwhelmed by the amount of choices at your fingertips.

This guide will be useful regardless of the type of call center you're looking to set up (inbound or outbound, sales or support). Some points will apply to some situations more than others, but the advice will be geared towards helping you build a call center of any type.

Thank you for downloading this ebook! Now let's get started.

Chapter One

Planning for your call center

The first step to building a successful call center is defining clear goals and objectives.

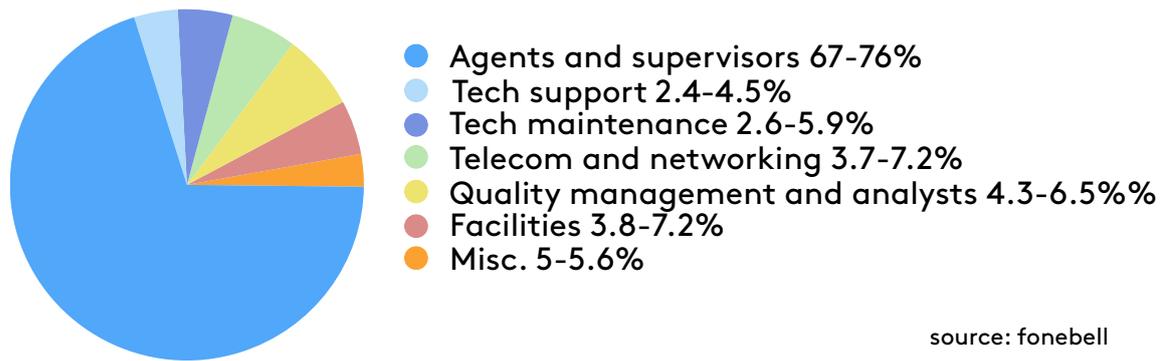
Before you set out to bring your operation to life, there are a few questions and choices to consider. Without proper planning, you'll likely find yourself in a tight spot. Here are some guidelines to help you take some time to strategize and avoid doing damage control down the line.



Set a budget

Before you make any decisions, you need to have a clear idea of the funds at your disposal. Your available funds will winnow out your options in terms of tools and workforce. There is a difference between the initial investment required to build a call center and the recurring fees necessary to keep it running. Your budget needs to account for both.

Breakdown of average call center expenses



Think of revenue

Outbound call centers will generate revenue in the form of leads and sales. Inbound call centers, however, have a more tenuous link between operation and profit. Even if your call center doesn't bring in revenue in of itself (if it provides customer support, for instance), it will hopefully improve your customer's experience, boost customer retention, and benefit your bottom line.

Establish goals and define relevant KPIs

Depending on your focus (cold calling, lead generation, customer support, etc.), determine which Key Performance Indicators, or KPIs, you should monitor.

KPIs are quantitative measures of your call center's efficiency, speed, and quality of service. They will give you an idea of the performance of individual agents and of your team as a whole, thus allowing you to make data-driven decisions to improve customer satisfaction and increase revenue.

The KPIs that matter

There are a great number of possible KPIs. Monitoring all of them is not only practically difficult, but it is inadvisable as well. By tracking too many performance metrics, you run the risk of missing the forest for the trees.

Instead, select the ones which are truly relevant to your goals and corporate strategy. Pick KPIs which reflect areas requiring excellence or improvement, and continuously review them for progression. Commonly scrutinized call center KPIs include:

- Cost per call
- Agent utilization
- Customer satisfaction
- First call resolution

A **1%** improvement in first call resolution results in



an average of **\$276,000** in annual operational savings.

source: SQM Group

Once you have a first review of your performance, adjust your monitoring strategy to focus on new strengths and weaknesses. Set precise targets to define success, and make sure they are clear to your whole team. Lastly, craft a recovery plan, should you fall short of your objectives.

The next two chapters will help you select the right phone system, the cornerstone of entire your call center.

Chapter Two

Picking the right phone system: knowing your options

Understanding the basics of phone systems in order to know which will best suit your call center

Your phone system is the most important tool in your call center belt. The phone is still the service channel preferred by a majority of customers.

What are your options?

To choose the right business phone system, you first need to determine whether you want your call center to operate onsite, or virtually.



Onsite call center

If you choose an onsite call center, your business will be responsible for choosing, setting up, configuring, and maintaining all of the infrastructure, hardware, and software necessary to your operation. Implementation can be costly and slow, and upkeep requires office space, upfront funds, and a

knowledgeable team. In the case of downtime and disaster recovery, relying on physical hardware can either be an advantage or a drawback.

Virtual call center

A virtual call center lets your business hit the ground running. The hardware and infrastructure is the responsibility of your service provider, so all you need to do on your end is install the software and have a reliable internet connection. This saves on upfront costs and office space.

In the case of an outage, cloud-based providers have recovery processes far beyond what an individual, smaller company could boast. However, it's still frustrating to rely on a third party to fix a problem when you're the one bearing the brunt of the inconvenience.

A virtual call center will also allow your team to work remotely. This means longer opening hours over several timezones, if needed. Virtual agents can be hugely advantageous to a call center especially a fledgling one.

Which phone system is best?

Second, you need to have a summary understanding of the different communication setups to choose from for your call center.

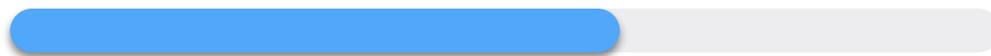
PBX

PBX systems operate through traditional phone lines. The server is kept and

maintained in your offices. This technology has been in use for many years, and its stability makes up for its lack of flexibility.

IP PBX

IP PBX systems handle your communications through your internet connection. Your communications server is either hosted onsite, or accessed remotely through a service provider. Your team will use SIP-enabled hard phones to place calls. IP PBX systems are getting to be well-established, but still rely on a decent internet connection to function.



In 2016, **6 out of 10** call centers had already transitioned to cloud-based technology.

source: IDC

Virtual VoIP Software

Virtual business phone software works without any hardware. Your phone calls happen through your browser, or your provider's app, right on your computer. The only tool needed on your end is a strong enough internet connection to support your call volume.

This chapter laid down some technical knowledge to help you navigate the selection of your call center's phone solution. The following chapter will help you be more discerning and informed when making the actual decision.

Chapter Three

Picking the right phone system: a step-by-step guide

Gnothi seauton, call center manager.

Now to brass tacks. When trying to choose the right business phone solution, you need to ask yourself several questions: about your goals, your activity, and your future.



What is your current set-up?

Are you starting a new venture from scratch? Are you looking to upgrade your existing setup? These are important questions to consider. For instance, opting for a PBX installation might not be possible if you aren't already equipped with the infrastructure, since digital has largely replaced analog.

IP PBX systems are slightly easier to implement, but you'll still need to purchase equipment and figure out licensing. Aim for a smooth transition; if

you're starting out, this might mean opting for a virtual setup. Conversely, if your business is already equipped with landlines, don't start from zero.

How heavy is your call volume?

If you consistently field a large amount of calls (inbound and/or outbound), it might be best to favor a stable analog connection. You could have a digital backup in case of infrastructural issues, as well. If your team is very large, an analog solution will take a long time to implement.

However, if flexibility is an issue, such as in the case of seasonal activity, then virtual is the way to go. Adding and removing users to a PBX or IP PBX installation means purchasing extra hardware and possibly having a surplus on your hands. A virtual business phone subscription is much more flexible.

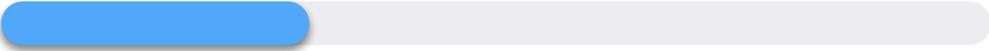
What is your budget?

This is where the budget you painstakingly balanced in chapter one comes in. When looking to choose the right business phone option, you need to consider both upfront and ongoing costs. A PBX will have high upfront costs, for hardware, licensing, and installation. The cost of an IP PBX will depend on whether you're responsible for the hardware or not. They will both have considerable ongoing costs as well, such as software updates, equipment maintenance, and replacing obsolete hardware.

A virtual solution requires no upfront or maintenance costs, but rather charges a per-user, per-month subscription.

How do your employees work?

If you're looking to change up your existing business phone system, there will always be an adaptation period to any new technology. Be it getting the hang of a new hard phone or a unified virtual interface, it will take a little time.



By 2018, **25%** of customer service teams will include at least one virtual assistant.

source: Gartner Predicts

Remote and mobile employees have different needs

If your employees often work from their mobile phones, then a PBX with hard phones just won't work. IP PBX will still need you to be connected to your server through an internet connection. For a workforce on the go, or for remote employees all over the globe, you might choose a virtual VoIP system. That way, your team will be able to work from anywhere, and access their session, contacts, and logs from wherever they please.

Which features are essential to your activity?

Choosing the right business phone system for you means looking at which features you expect from your system. Though the technology of virtual phone systems is still quite new, many services boast the same call features as PBXs and IP PBXs: call waiting, transfers, intelligent routing, and so on. These features are more stable on hard phones, since they have existed for longer and the technology is less cutting-edge.

Virtual phone systems have the edge on innovation, however. They offer real-time monitoring and call recording in a much more accessible way. Even without expertise in data analysis, you can benefit from the monitoring software included with many virtual business phone services.

How reliable is your internet connection?

If you choose a PBX system, you won't need to worry about your connection supporting your phone system. However, this setup is increasingly antiquated. High-speed, reliable internet with equal up- and download speeds is accessible to even smaller businesses.

Will your phone work with your other tools?

One clear advantage of virtual phone systems is that they can integrate directly with many of the other tools your business uses daily.

The trend towards a unified business interface is growing. It represents both an economy of time as well as a seamless transitions between all the tools your team uses daily. This means a more productive and empowered workforce, which trickles down to a more satisfied and successful customer.

A PBX doesn't interact with your other digital tools at all, and an IP PBX only deals with phone calls. But a virtual system can integrate with your CRM software, your live chat or email service, your help desk, your call scripts, your survey templates, etc. This will be the focus of the next chapter.

Chapter Four

Best practices for setting up a call center

Actionable tips to get your call center on its feet on your first try.

The questions above are a good place to start, but here are a few more tips to help you choose the right phone system and hit the ground running.

Precisely define success

Above all else, you need to have defined goals in mind when trying to choose the right phone system. Consult your staff and get a feel for what they consider to be important. Could transferring calls be easier? Would it be useful to sync your call logs with your CRM? Perhaps poll your clients, and determine how the phone could be used to make them more satisfied. Could they benefit from a more efficient call routing feature?

Consider future growth

Choose a phone system which will work as well for you now, as it will when your business has grown in size. Consider what you wish for your business in terms of expansion, and pick the option which will help you work towards those goals. In short: if you wish to have a reliable, large-scale, solid system,

go for an IP PBX. If your emphasis is on scalability, mobility, security, or international growth, pick a virtual business phone system.



In 2016, nearly **80%** of contact centers said that their current customer service systems won't meet their future needs.

source: Dimension Data

Consult a professional

If you're struggling to choose the right phone system, it might be worth it to consult a professional. Perhaps your business doesn't have a dedicated IT department, so you're finding it difficult to wrap your head around the technicalities. You could hire a consultant for this purpose, to take stock of your goals and resources and find a solution that takes both into account.

Take advantage of free trials

Shop around! No matter what solution you pick, you'll have options and a large choice of providers. Make sure to get quotes, and to take advantage of free trials to make sure that a given service works right for you to truly choose the best business phone system.

Choose your other tools wisely

As stated above, the way your phone system meshes with your other professional tools will affect your team's productivity and your customer's

happiness. Here is a short list of useful tools to bear in mind, and how to select them.

CRM solution

Your Customer Relationship Management software is the hub around which your client interaction is structured. It will assist you in streamlining your sales process and accompanying your customers along their journey. Pick a CRM solution which will mesh well with your objectives, your team's habits, and your customer's needs.

Internal communication

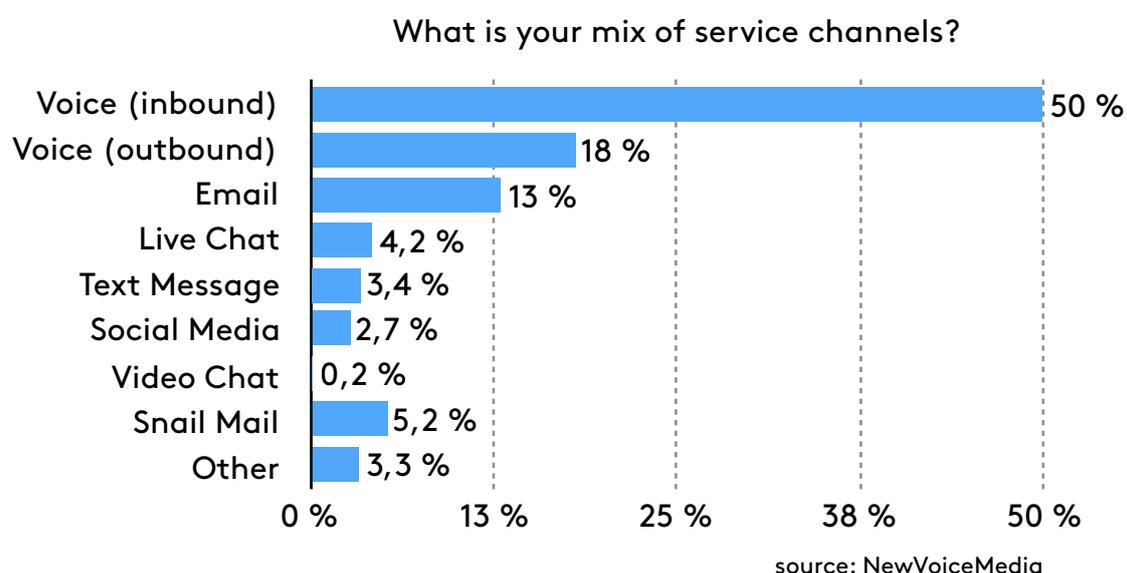
Your team will need a way to communicate with one another, to conserve both time and effort as well as work collaboratively. There exist a plethora of available tools to give your support team a boost. Pick and choose the ones best applicable to your activity.

Don't neglect your remote agents, if they exist. Virtual agents have a great many advantages for employers, but they require the proper tools in order to be productive and fully mesh with the rest of your team.

Alternative service channels

Perhaps your contact center needs to be available to your customers over multiple channels. Developing an omnichannel strategy is a challenge in of itself. In order to stay on top of your customer's expectations, offer only

channels you can manage successfully, and offer a consistent customer experience across the board.



Support desk

If your call center handles inbound support calls, you'll need to keep track of every customer's interactions with your team. The right help desk software will strike a balance between self-service tools for your customers and a comprehensive interface so that your team can be more efficient and reactive.

Performance monitoring software

Going back to a point mentioned above: if you want to adequately track your call center's performance over the phone, you'll need to invest in monitoring software. In order to devise a monitoring strategy for your team, opt for a program which will allow you to record the calls you need and measure the metrics you consider important.

Call center monitoring is the continuous process of data collection, analysis, and feedback. First, you gather data pertaining to your call centre's performance (employee efficiency, customer attrition, speed of execution, etc.), then gain insight from it, and then implement change relative to that insight. Finally, you start over from the top.

Given the overwhelming importance of customer retention, it's extremely worthwhile to have ways to measure customer satisfaction, product adoption, and customer engagement. Call monitoring can be a valuable asset for businesses looking to constantly improve their interactions with customers. This might be a deciding factor for small call centers, or ones with a focus on customer service.

Conclusion

Setting up a call center requires dedicated planning, careful execution, and a willingness to constantly evolve. With the rising expectations of customers in terms of service, running a call center is undoubtedly a challenge. Thankfully, the tools available to you are more bountiful and sophisticated now than ever before.

Thank you for reading this ebook. We hope it has empowered you to make savvy decisions, and to make your call center a success!