



Self-Assessment Questionnaire

1) Contact Information

First Name: _____

Last Name: _____

Title: _____

Company: _____

Email Address: _____

Phone Number: _____

Use this worksheet to gather your answers before entering your choices on line.

Please mark with a 0, 1 or 2 based on these responses:

2 = We have this capability today

1 = This would not add value to our company

0 = Having this would help our company.

2) Inbound activities

Customers can chat with agents from websites or mobile apps.

Email inquiries are routed to the most qualified agents (like contact us forms or support questions).

Self-service and/or live assistance is available to customers in response to SMS notifications.

Agents can engage consumers through social media.

Intelligent routing (based on contextual data) ensures consumers are connected with the most appropriate agent.

Intelligent routing capabilities include support for work-at-home agents.

Callbacks can be scheduled by the customer.

3) Outbound activities

List management capabilities include uploading of call lists and retry management.

Predictive dialer can screen out no-answers, busy signals, answering machines and disconnected numbers.

Wireless numbers can be identified in order to be compliant with Federal regulations around automated dialing to cell phones.

Automated consent-controlled routing is available when calling mobile numbers.

Time-zone determination by phone number, postal code, phone/postal combination, or customer preference is possible, expanding compliant calling windows.

4) Social Engagement

Customer care and engagement extends to social media channels.

Social interactions can be automatically categorized and prioritized based on business rules.

Social engagement service levels can be monitored and measured.

Response time to social conversations/postings is less than 2 hours.

Social conversations can be blended with other channels in a unified agent work queue.

5) Self-Service

Self-service is available on more than one channel (e.g., SMS or social in addition to IVR).

Context is preserved across channels, even when going from self-service to agent-assisted, so customers do not have to repeat information.

Context is preserved even when a transaction is interrupted and continued at a later time.

Live service is available to customers from within their mobile app of choice.

Proactive notifications can be personalized so customers only receive information of interest.

Appointment reminders and surveys can be automatically generated and delivered via the customer's channel of choice.

Customers can respond to proactive notifications—for example, change appointment times.

6) CRM Integration

Agents can make a call by clicking on a contact number within your CRM system.

Pop-up screens display contact details including preferences and cross-channel transaction history when agents take an inbound call.

A CRM activity record is automatically created once an interaction is completed.

A new contact/lead can be created from an inbound call, chat or web form.

A case/support ticket can be created from an inbound call/chat/web form.

All customer activity and history can be reviewed in a single screen.

7) Workforce Management

- Staffing models yield a high degree of forecasting accuracy.
- What-if analysis can assess the effect of service disruptions and resource constraints.
- Schedules can be optimized based on business need or employee preference.
- Adherence monitoring flags non-compliance in real-time.
- Trial schedules can be created and tested before deploying an official schedule.
- Supervisor self-service capabilities include the ability to access shift changes and time off requests from a mobile device.
- Seat assignments are done using seat maps and floor plans.
- 'Hot seating' can be done based on actual schedules.

8) Quality Management

- Call recordings can be retrieved instantly.
- Agent evaluation and coaching is easily done.
- Fast scoring calibration on calls is possible.
- 100% recording of screens and audio is possible.
- Rules for specifying when recordings take place are sufficiently flexible.
- Post-call surveys can be integrated into customer interactions.

9) Performance Management

- Reporting and dashboarding capabilities can accommodate supervisor needs as well as those of executive management.
- Integrated workflows allow performance issues to be understood, shared and improved through training and coaching.
- Performance-based coaching automatically schedules, tracks and measures effectiveness of supervisor coaching based on business rules.
- Contact center data can be combined with other enterprise sources (such as CRM systems) for comprehensive reporting.

10) Speech and Text Analytics

Agent knowledge gaps and training opportunities can be identified by topic area across all conversations.

Root cause analysis can be performed on topics most frequently mentioned by customers.

Real-time speech analytics monitor customer interactions as they happen, enabling real-time agent guidance and “next best action” rules.

Data can be delivered to both front-line and back office personnel, allowing the business to analyze where staff is spending their time.

Actions taken during unproductive agent time can be monitored for abusive behavior.

11) Back Office Operations

There is visibility into employee availability, work task details, number of tasks, tasks completed and backlog.

Work can be automatically pushed or pulled according to business logic and rules.

Back office tasks can be automatically provided to contact center staff based on skills during low occupancy periods.

Work tasks can be captured from multiple systems (such as manual files and email).

Operational management dashboards provide clear visibility into key performance indicators.