

TALKDESK WHITE PAPER

Cut costs in your contact center by moving to the cloud

:talkdesk®



Table of contents

Introduction	03
I. Make a strategic decision	05
II. Integrate core CX systems	08
III. Automate key business processes	10
IV. Drive adoption	12
Conclusion	13

Introduction

Over the last few years, contact centers have been modernizing their operations by shifting from legacy, on-premises call center technologies to agile, cloud platforms that deliver a better and more cost-effective customer experience (CX). The global pandemic put this transformation into overdrive, forcing many organizations to move to the cloud to keep their agents safe, connected, and servicing customers from their homes and remote locations.

60% of companies will have agents working from home for the foreseeable future.

— TALKDESK BUSINESS CONTINUITY SURVEY, JULY 2020



The cloud brings inherent benefits that are vital in today's environment:



An unlimited ability to enhance performance and add new systems and capabilities.



The flexibility and speed to provision or deprovision access to vital resources anywhere in the world as soon as market dynamics demand.



Pre-built integrations and application programming interfaces (APIs) to seamlessly connect core business systems and enable data exchange.



Redundant architecture that reduces downtime, prevents data loss, and enables compliance.



Limitless storage and centralized access to data make it easier and faster to share insights across the enterprise.



Reduced IT resource utilization and pay-as-you-go models that provide budget flexibility and financial stability.

Despite these obvious advantages, moving to the cloud can feel daunting. Companies are operationally dependent on their legacy systems and many are still trying to achieve the return on investment (ROI) from their original capital expenditures. But the benefits of the cloud far outweigh the costs of running a system designed in a previous era. Manual updates, point-to-point integrations, delayed and incomplete access to critical data, waiting for developer resources to make simple updates—these drain budgets, produce poor customer experiences, and expose the business to risk.

This white paper outlines the business case for a cloud-native contact center and provides a roadmap to successfully transition your operations to the cloud without disrupting your customer experience team's ability to service your clients.

I. Make a strategic decision

Many organizations are initially tempted to slap cloud functionality (e.g., a simple web portal) on top of their on-premises contact centers in the hope it will be the quickest and least disruptive path to the cloud. This Band-Aid approach, however, perpetuates all of the same underlying shortcomings of their legacy systems—inability to integrate, expensive to maintain, siloed information—and just adds another layer of complexity.

A full cloud deployment, however, does not need to be a prolonged exercise that necessitates “ripping and replacing” all your current CX systems. By adopting an open-architecture cloud contact center, you can immediately move vital operations and applications to the cloud and then integrate other systems and processes as resources and time become available.

This ability to seamlessly scale your operations—whether it’s adding new systems or bulk provisioning of additional users—is one of the fundamental benefits

of open cloud architecture. Any initial investment will be quickly offset by improved efficiency and operational agility (e.g, the ability to stand up a remote contact center overnight). But more strategically, as you move more applications onto your cloud contact center platform, the business becomes more data-driven, agile, and resilient. Business processes can

be quickly reconfigured to meet new customer experience demands or address new markets. Real-time insight into contact center performance can immediately address any operational irregularities and drive continuous improvement. And workflows can be automated across applications to reduce complexity and streamline vendor management.

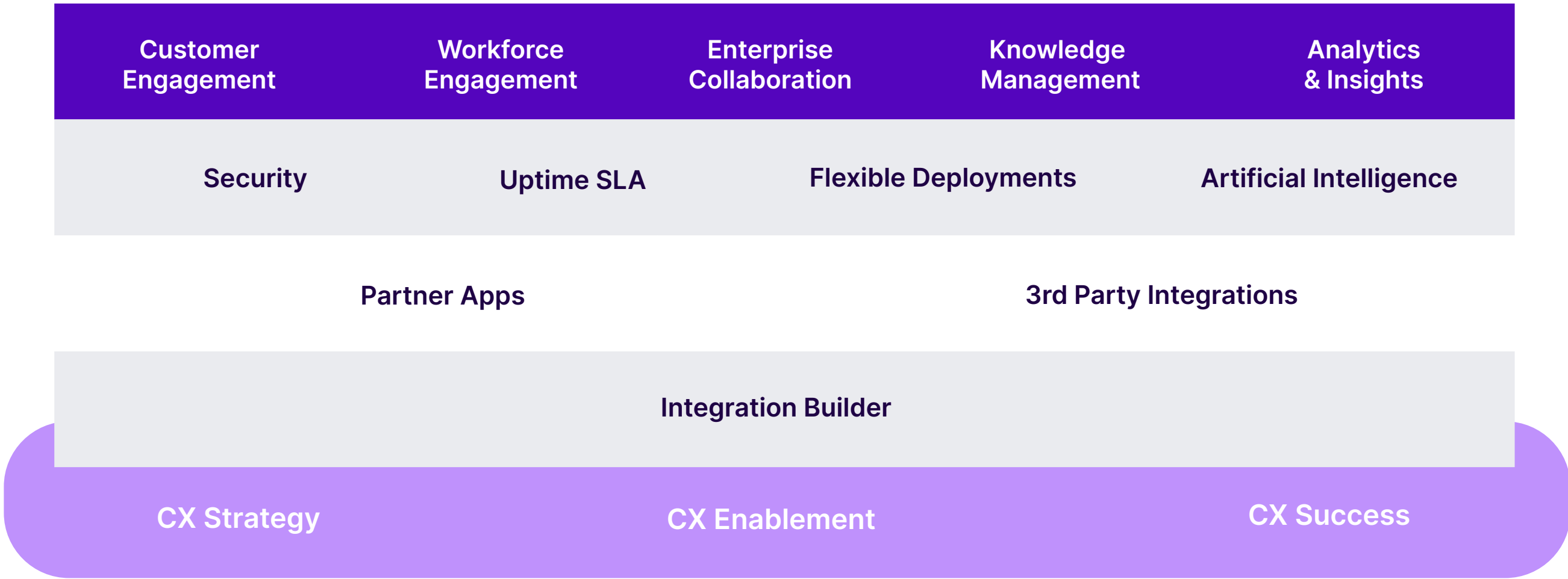


Figure 1 • A Cloud Native Contact Center
A cloud-native contact center helps agencies become more data-driven, agile and resilient.

Types of cloud contact centers

When evaluating cloud contact center platforms it's important to distinguish between cloud-native platforms and those that require additional on-site infrastructure. While many of the first-generation software-as-a-service (SaaS) offerings provide some of the advantages of the cloud, they were mainly architected for lighter applications (e.g., websites, mobile applications) that did not manage a significant amount of data. Integrations with enterprise systems such as customer relationship management (CRM) systems, enterprise resource planning (ERP) systems, and other data-heavy applications are consequently complex, slow, and require a partial on-premises deployment. Updates and system validations require heavy staffing and monopolize a significant portion of the IT budget.

Today's cloud-native platforms, however, can easily integrate with the most data-intensive, enterprise systems. Hundreds of terabytes of data can easily be stored in the cloud - whether you are hosting applications or building data lakes. APIs and software development kits (SDKs) make it straightforward to integrate with the most common business systems, build applications and migrate data. Many of these systems are also in the cloud - Salesforce, Slack, Google, Microsoft Office, Jira, etc.—and also publish APIs to enable highly secure and stable integration points.

Security is another area of divergence. At first glance, it may seem as though systems with an on-premises-based firewall would offer greater protection. But, because these systems typically use outdated technology, the integration points

with other applications are often fragile and expose system vulnerabilities. Data can also be slow to synchronize between systems—making it difficult to detect an irregularity in time to proactively manage and minimize any fallout.

The web application firewalls (WAF) on cloud-native platforms offer the same granularity of control as on-premises firewalls but can be much faster at detecting malicious traffic. The WAF sits between the cloud application and the internet and filters all traffic—forcing all users to pass through the WAF before gaining access. The policies and protocols of the WAF can easily be updated for faster response to new threats and vulnerabilities.

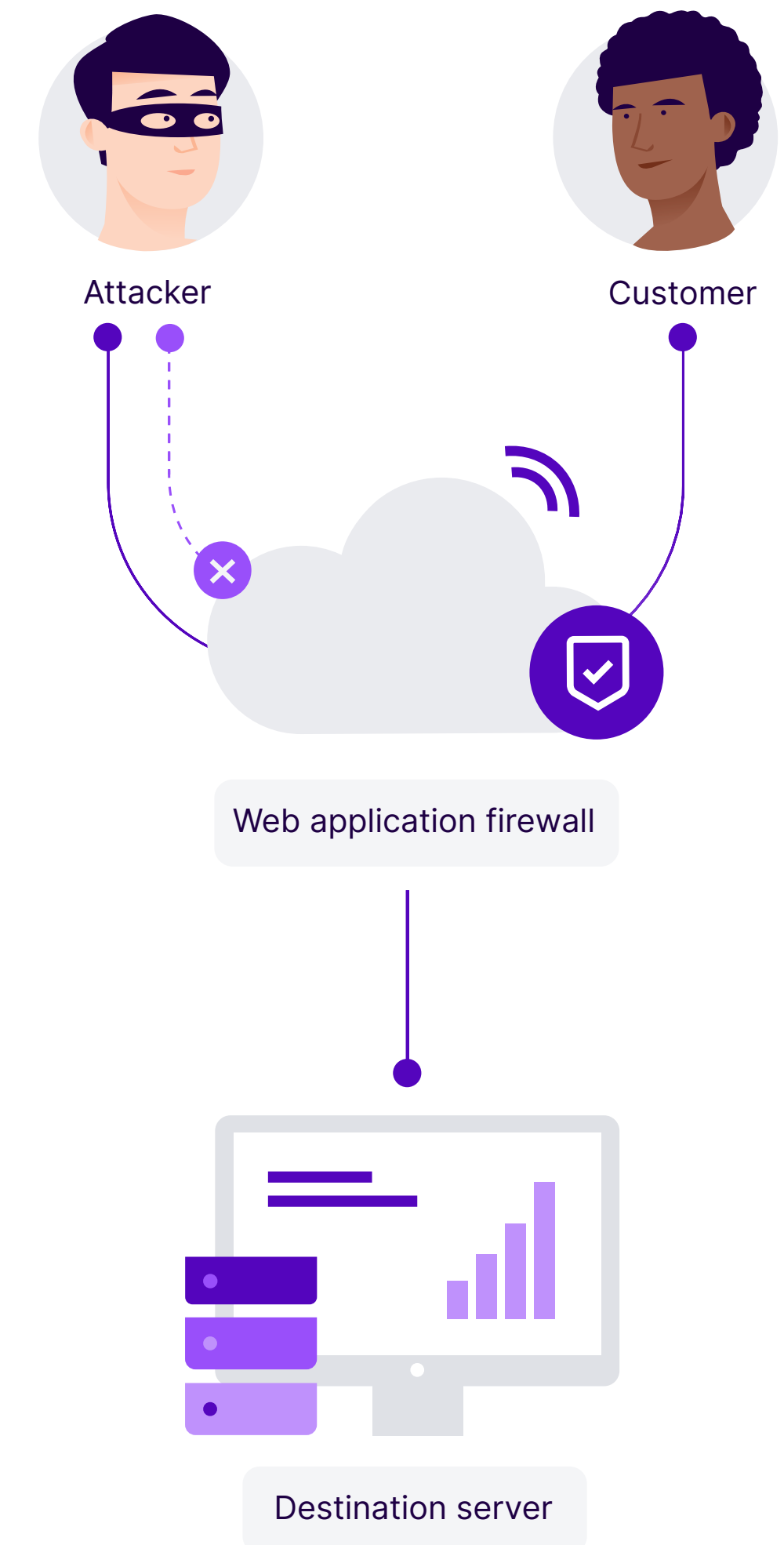
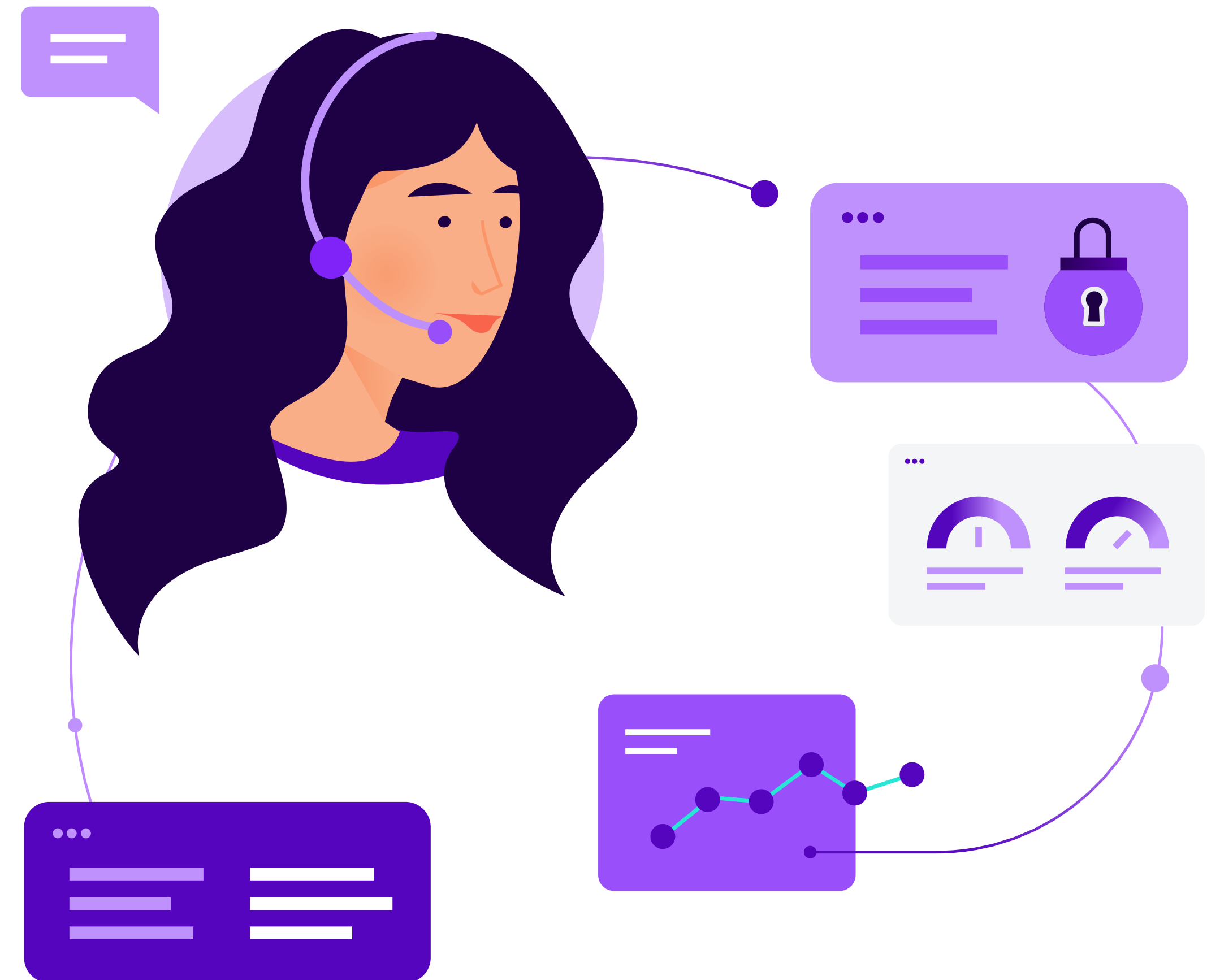


Figure 2 • Web application firewall

Additionally, global organizations that need to comply with data privacy regulations such as the General Data Protection Regulation (GDPR), might find it difficult to comply if a number of their systems are isolated on-premises in a specific geographic region. With cloud-native systems, data can be stored anywhere you establish a data center, allowing you to ensure personal identifiable information never leaves a specific geography while still being able to take advantage of the data.

Moving to a cloud-native contact center platform delivers immediate benefits that cannot be experienced via a fully or partially on-premises system. It also sets the stage for integration and automation—next-generation digital transformation that can significantly improve agent productivity, lower IT costs and streamline vendor management.



II. Integrate core CX systems

To deliver the customer experience expected today—seamless, omnichannel interactions—requires data and application integration. Agents need to be able to immediately engage with the customer through his or her preferred channel and can't stumble opening applications and searching for data. In fact, according to the 2019 Gartner Business Application Integration Survey, 74% of respondents indicated "increasing efficiency" as one of the top three business goals for integrating business applications with other systems.

It's easy to understand why, considering the average employee uses eight applications when they work¹, and the typical 200-500 person company uses an average of 123 applications across the enterprise². Just logging in and out of these applications wastes valuable time, let alone blocks easy access to vital information.

¹ 2019 Annual SaaS Trends Report, Blissfully. <https://www.blissfully.com/saas-trends/2019-annual>

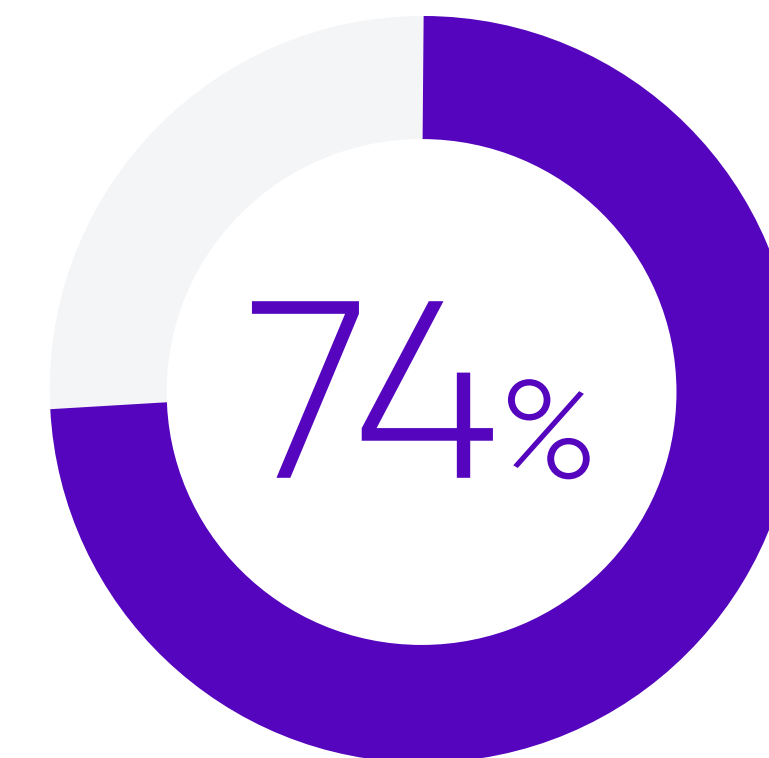
² Ibid

Integrating these applications lets data flow freely and helps improve the customer experience.

For example, by integrating the CRM with the contact center, customer data can display in a pop-up for the agent when a customer calls without having to log into the CRM. But integration isn't just about easy access to information it's also about speed to resolution:

- By integrating an order management system, agents may be able to inform callers about the status of their orders in mere seconds. Or even better—their intervention might not even be necessary;
- By integrating marketing automation platforms, callers who just reached out with a complaint could be immediately compensated by receiving an automatically triggered discount voucher in their email inbox.

All this means fewer apps, fewer clicks, more space for innovative approaches, and customers served with less wait time.



of respondents indicated "increasing efficiency" as one of the top three business goals for integrating business applications with other systems.

Out-of-the-box integrations accelerate ROI

To get the fastest ROI, look for cloud contact centers that offer out-of-the-box integrations with the applications most commonly used to support call center agents—CRM, workforce management (WFM), collaboration, etc. Not only are the integrations stable, but common workflows are often already mapped out across applications and don't require any coding to build and automate. Once your core CX applications are integrated you should see an immediate impact on:

- Reducing average call handle time
- Improving first call resolution
- Optimizing staffing
- Eliminating extensive development time

Ideally, it's best to integrate every customer data application that will improve CX and empower agents to anticipate customer needs, but this is often best accomplished in stages to ensure adoption and minimize disruption. Cloud platforms that publish well-documented and easy-to-access APIs are the most effective when integrating a complex enterprise architecture with robust development needs.

Integrated systems set the foundation for automation, the next step on the path to digital transformation.

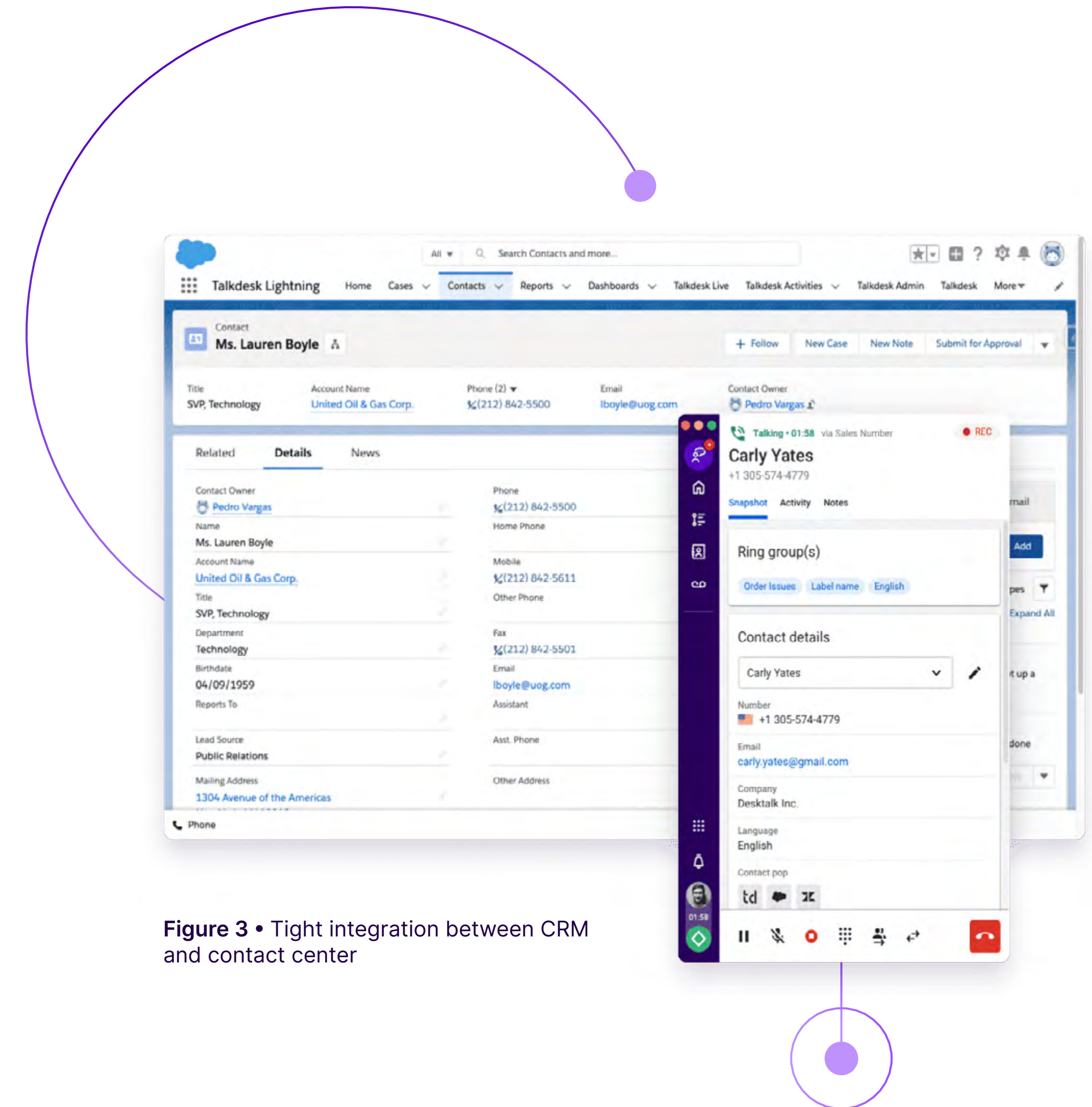


Figure 3 • Tight integration between CRM and contact center

III. Automate key business processes

Automation frees up humans to focus on executing higher-value work and reduces the potential for human error. In the contact center, this lets agents focus on more complex customer issues instead of handling simple inquiries and administrative tasks. Contact centers with demanding customers and quick turnaround times can also be high-stress environments. Humans are more prone to make mistakes when under pressure and automating activities such as call routing, logging, communication, etc., helps agents focus on delivering the best customer experience.

From the customer's standpoint, automation ensures they enjoy the same standard of care with every interaction—improving CX consistency. They deepen their trust in the business, which can translate into strong customer loyalty and lifetime value. The example in Figure 4 shows how an automated

workflow to resolve a customer problem can result in a positive and consistent customer experience.

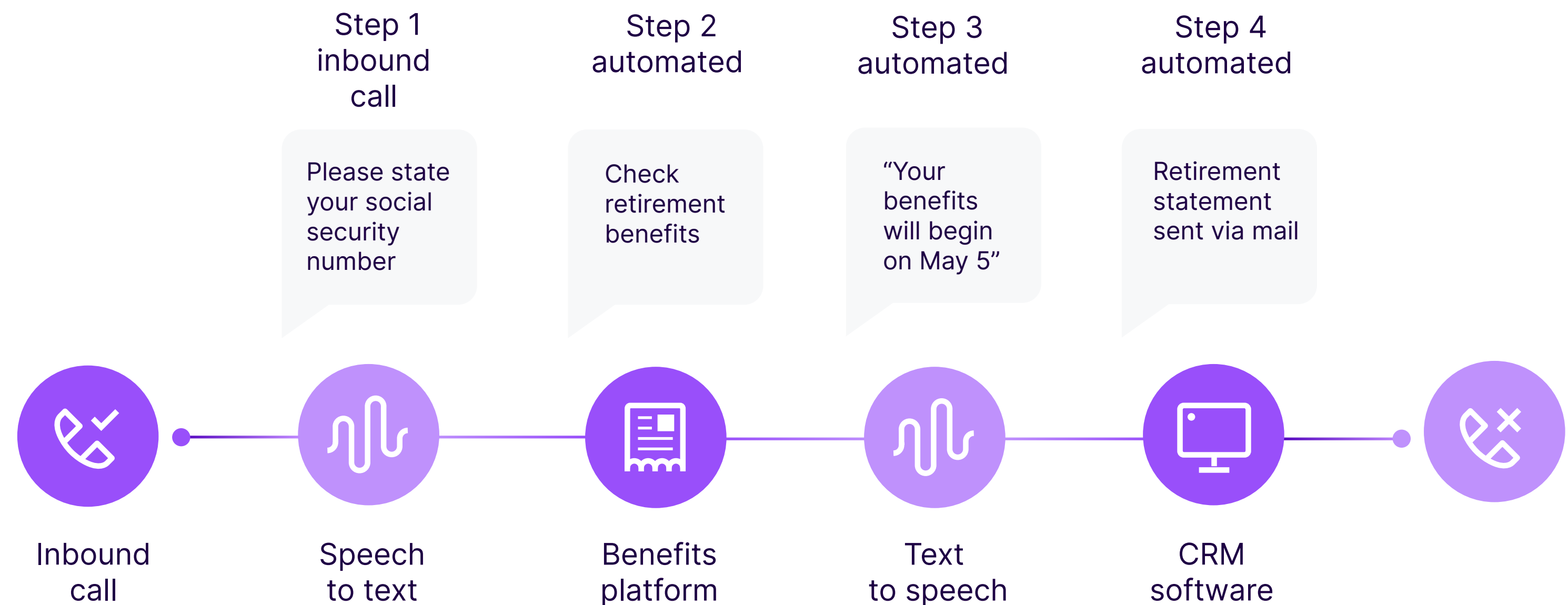


Figure 4 • Automated CX workflow Automated workflows ensure a consistent standard of care.

Automated workflows ensure a consistent standard of care

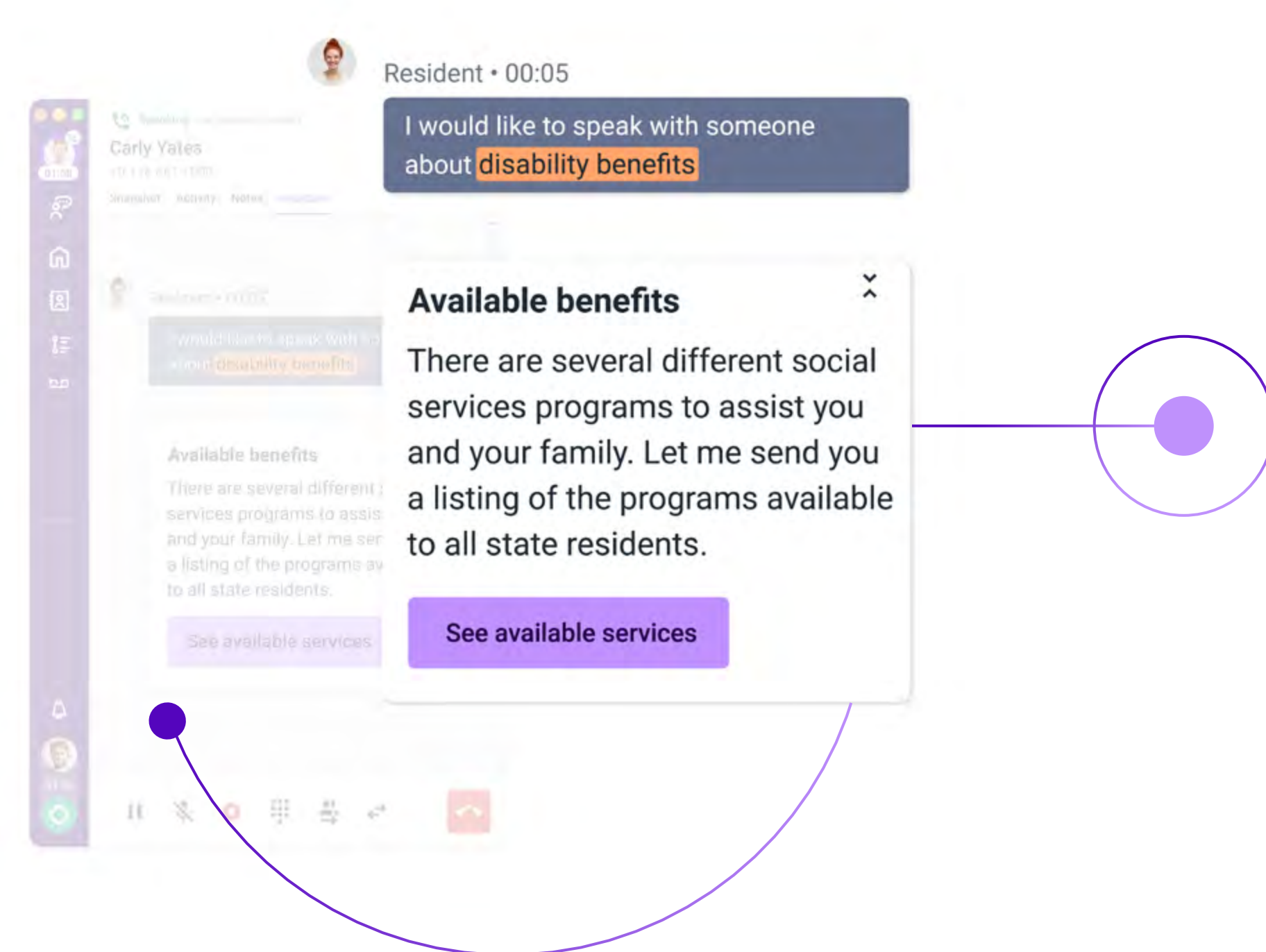
Automation also empowers better workforce management and quality management by automating scheduling and forecasting, continuously updating the knowledge base, and keeping employees informed on how to best resolve issues.

Some organizations have deployed cloud platforms with machine learning (ML) and artificial intelligence (AI) capabilities to get an even greater competitive advantage from automation. With ML, as the system gathers more and more information, data science algorithms can identify patterns of behavior and use them to create ideal CX workflows. AI also sets the stage for more advanced automation capabilities such as agent assistants that proactively guide agents and callers through next best steps or chatbots that can mimic human conversations.

Talkdesk Agent Assist™ uses AI to empower agents with intelligent guidance: it listens, learns and provides recommendations in every conversation to help resolve complex customer issues faster.

By diminishing errors and improving agent efficiency, automation can help the contact center lower its overhead—both from the IT budget as well as the line of business—while simultaneously increasing revenue.

To reap the benefits of these process and system improvements, however, requires buy-in across senior leadership, including chief experience officer (CXO), chief financial officer (CFO), and chief information officer (CIO).



IV. Drive adoption

Convincing people to use new systems and follow new processes can often feel like an exercise in futility. Successfully moving to a SaaS model and a data-driven culture requires support from executive management down to the individual agents using the system.

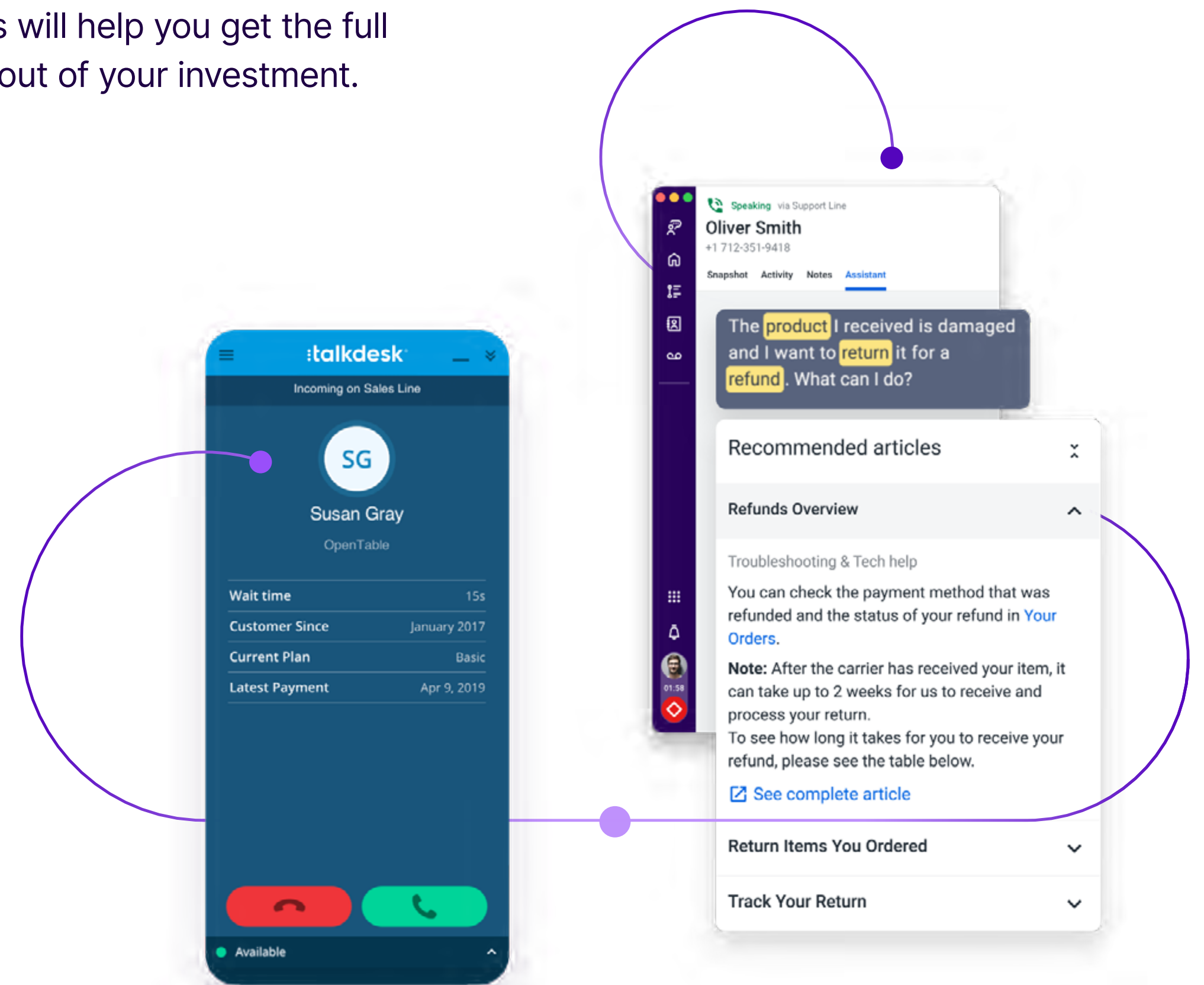
To accelerate adoption among these different constituencies and get the fastest ROI from your move to the cloud, look to:

- Invest in systems built with graphical user interface (GUI) design principles. CX systems should be easy to use and offer the flexibility and mobility associated with today's consumer-facing applications. Adopting a modern contact center with a UI that can be configured uniquely for agents, supervisors, administrators, etc. will vastly improve adherence to business processes.

- Create simple and interactive end-user training. Cloud contact centers that leverage GUI design principles are built to be intuitive and easy to use, but centralized access to training with interactive tutorials is still imperative to drive adoption.
- Empower other stakeholders. Cloud adoption decentralizes spend across the entire organization and no single department or role should manage it alone. IT leaders, along with other departmental managers, must adopt a collaborative approach to overseeing all the cloud applications, as these will improve not only data visibility across teams but the organization's overall productivity.

Adoption is the ultimate metric of success for any new technology initiative. In addition to the steps

above, maintaining executive support and soliciting ongoing feedback from end users will help you get the full potential out of your investment.



Conclusion

The global pandemic has mandated fast change for many companies. As contact centers adapt to new ways of working, best practices must replace survival strategies.

A cloud contact center platform that allows you to easily integrate your systems and automate workflows is a strategic asset for your business. Not only does it help your contact center run optimally, but it also offers the modern capabilities to future-proof the business against ongoing change and disruption:

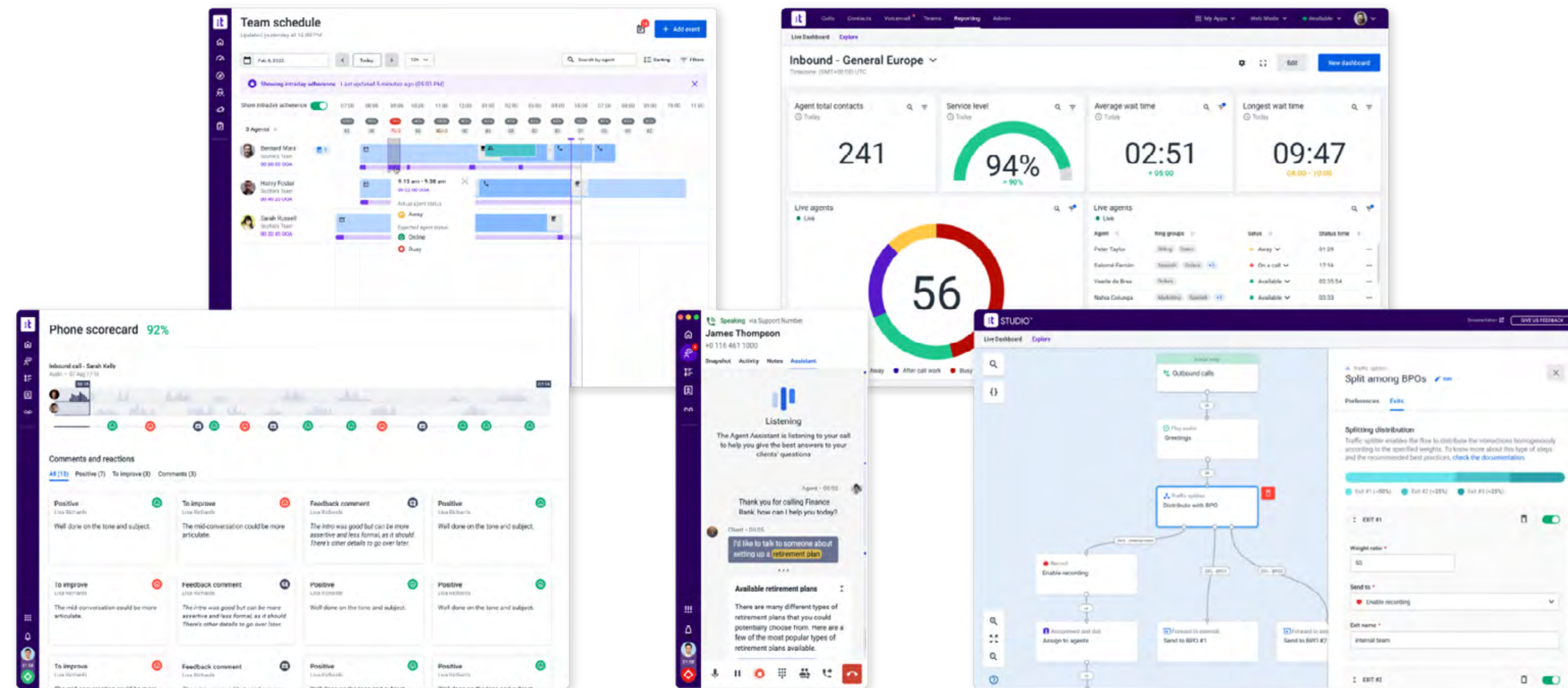
- Rapid scalability
- High extensibility
- Available anywhere, on any device
- User friendly
- Easy maintenance
- Secure
- Cost-effective

While replacing core systems requires careful planning, with the right technology IT leaders can ensure business continuity, lower costs and elevate the customer experience.

To learn more about the ability of cloud contact centers to scale, read this white paper on overcoming the IT challenges associated with [Running a virtual call center](#).



An end-to-end solution for delivering great customer experiences



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Talkdesk® CX Cloud™ is the market leading secure client banking solution designed to integrate every client engagement across channels and lines of business. Talkdesk's banking solution integrates with core banking systems such as FIS, FiServ, and Ellie Mae to unify the client experience across the bank to reimagine banking. Talkdesk CX Cloud maintains security and compliance with a rigorous enterprise-grade platform that holds 30+ certifications including those specific to financial services. With an award winning cloud-native solution, banks can rapidly deploy integrated communications across a flexible, secure platform to deliver differentiated client experiences that build and retain loyalty. Learn more at www.talkdesk.com

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