



# Artifact Collection Sheet

## UC & CC

Contact Center: IVR & Call Routing	Existing	Future State/Requirements
Manufacturer of Platform & Type (Premises, Cloud, Hosted by Service Provider)		
How many toll free numbers? Local numbers? Need to port them over?		
How many contact center agents?		
How many contact center locations?		
Any Virtual agents (Work from?)		
Do you outsource your agents? (BPO)		
ACD/Agent Phone type (hard or soft phone )?		
How many skills/hunt groups ?		
Define call types (i.e. Cust Serv, etc.)?		
Skills based routing required?		
CTI/Screen Pop utilized?		
Virtual queue/call back required?		
Define existing Desktop environment (VDI, etc)? If yes, what are using?		
Do you offer a knowledge base to your agents?		
Do you offer any real time guidance for your agents during their workflows? (Agent Assist tools)		

Call Recordings	Existing	Future State/Requirements
Call recording storage requirements (short & long term)?		
Real time or post call transcription required?		

CRM & Data Bases Integrations	Existing	Future State/Requirements
Type of CRM, Case Management, and other 3rd party platforms utilized today?		
Is there a need to integrate to an external system (e.g. CRM, Database, ERP, etc.)?		
MS Teams used today? If so, license types?		
Do you outsource to 3rd party marketing companies?		

Interaction Volume (calls, chats, etc.)	Existing	Future State/Requirements
Annual Volume of Inbound calls (minutes & number of calls)?		
Annual Volume of Outbound calls (minutes & number of calls)?		
Annual Volume of Email (if applicable)		
Annual Volume of Chats/SMS (if applicable)		

KPI Metrics	Existing	Future State/Requirements
Average Handle Time		
Average Talk Time per call (seconds):		
Average Abandon Rate (%)		
Average speed to answer		
Top 5 most common call types		

<b>Reporting/Data Access</b>	<b>Existing</b>	<b>Future State/Requirements</b>
What specific reporting requirements do you have?		
What statistics do you need to measure?		
How often do you run reports (manual, scheduled)?		
Dashboard, Call Reporting/Analytics needs? Please provide copies of current reports		
Do you have a need to bring data together from multiple/disperate systems and report on that data?		
Are APIs / Web Services available for those systems?		
Do you have a BI platform in use today?		

<b>Dialer/Outbound Capabilities</b>	<b>Existing</b>	<b>Future State/Requirements</b>
Outbound dialing required? If so, which type (Power, Preview, Progressive, Predictive)		
How many campaigns are used?		
Are campaigns manually uploaded via a CSV file?		
Do you need local presence? (Provisioned local numbers for agents to leverage when using a dialer, can be used to mask their main DID)		

<b>Workforce Management (WFM)</b>	<b>Existing</b>	<b>Future State/Requirements</b>
Type of WFM platform are you using if any? Will you need one?		
Do you have a need to automatically forecast your staffing needs and create agent schedules?		

<b>Quality Assurance/Scorecards</b>	<b>Existing</b>	<b>Future State/Requirements</b>
Type of QM system?		
Do you have a need for an Automated Quality Management System?		
Surveys- Do you have a need to automatically capture the voice of the customer after they have interacted with your agents?		

<b>Multi Channel/Omni Channel</b>	<b>Existing</b>	<b>Future State/Requirements</b>
Omni-channel utilized (Chat, Text, Email) or required?		
What channels do you support today or need in the future?		
Will you have chat launch points from websites for your customers to chat with your agents?		
How many chat points of contact?		
Will you need to receive inbound SMS messages?		
Will you need to be able to send out automated SMS messages (e.g. School Closure, Appt Reminders, etc.)?		
Are you leveraging social today? If so, what platforms?		

<b>Email</b>	<b>Existing</b>	<b>Future State/Requirements</b>
Will you have emails routed to agents?		
What is your current email platform (if any)?		
Can your email system be set to auto-forward emails to our platform?		

<b>Voice (Premise PBX/UC)- Back office</b>	<b>Existing</b>	<b>Future State/Requirements</b>
Manufacturer, Premises or Cloud/ Hosted		
SIP enabled?		
How many total users (Back/office/non-acd)?		
Phone types (hard phones , soft phones) and quantity?		
Collaboration tools provided by phone system? (Chat, Email, SMS)		
Voicemail/Unified Message		
Dial Plan (onsite dialing, e.g. 4 digit dial, etc)?		
Who performs "MACDS" (moves, add changes, and deletes) requests?		
Faxing required? Y/N		
Paging requirements (overhead,etc)?		
Data Center locations? (If premises)		

<b>Network (Voice/WAN/PSTN)</b>	<b>Existing</b>	<b>Future State/Requirements</b>
Type (PRI/T-1, MPLS, SIP, Internet, VPN, SDN WAN, etc.)		
Vendor/Carriers (s)?		
Any 3rd party vendor connections/ integrations?		
Network diagram available?		
DID Range		

<b>Security</b>	<b>Existing</b>	<b>Future State/Requirements</b>
PCI		
HIPPA		
GDPR		

<b>AI/Voice Bots/Chat Bots</b>	<b>Existing</b>	<b>Future State/Requirements</b>
Any Bots/Chats used today?		
Do you currently have a Bot in use for chat or IVR/voice?		
Is there a need for sentiment analysis?		
What are the top reasons customers contact you?		
What self service tools are used today?		

<b>Other Items</b>	<b>Existing</b>	<b>Future State/Requirements</b>
Gamification utilized (agent engagement) or required?		
Mobile App required?		
Do you have a desire to improve CSAT / NPS via guided process / next best actions (real time) for your agents?		