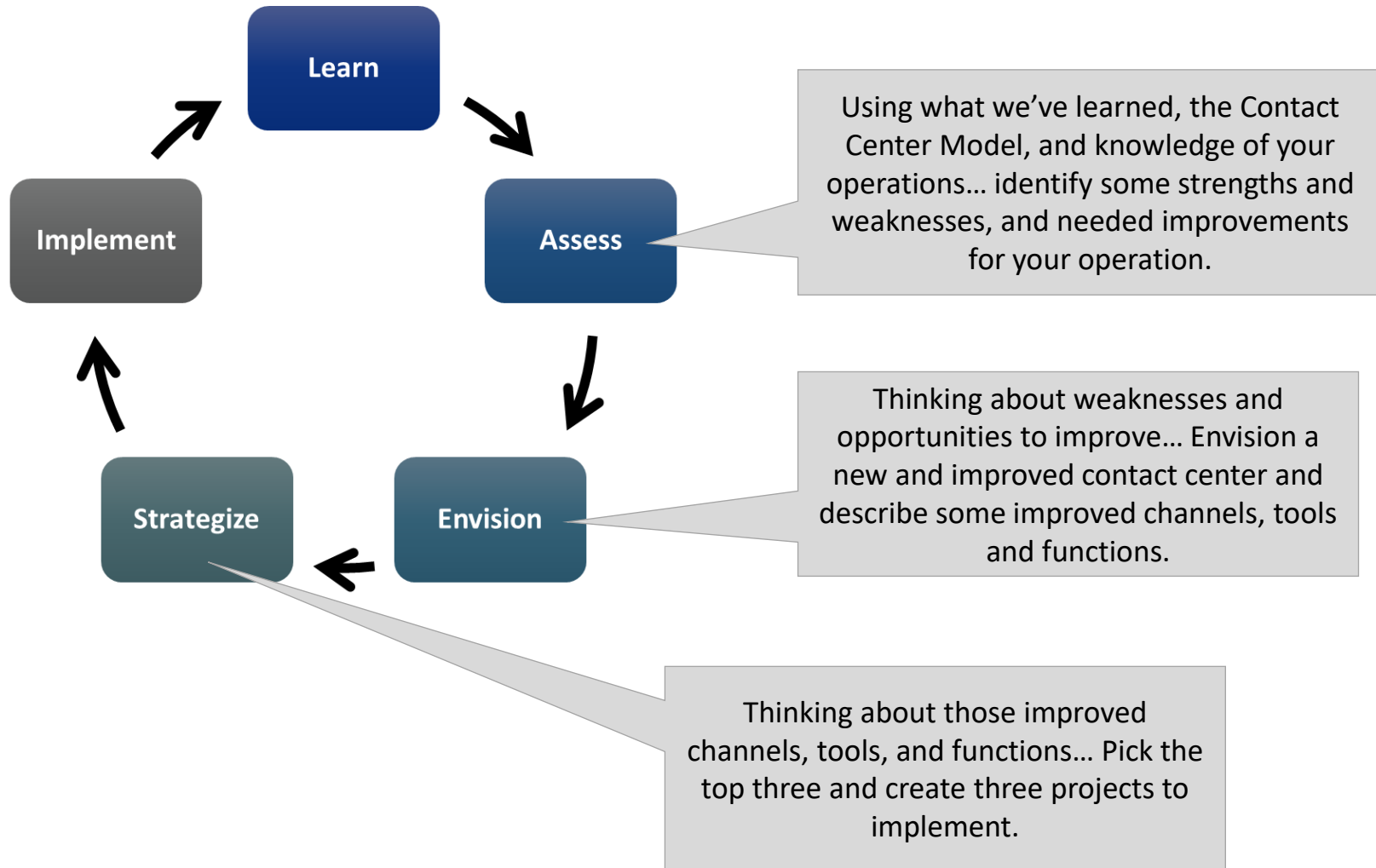


Workshop Exercise – Assessment > Vision > Roadmap

During the workshop we will assess our current operations, envision opportunities for improvement, and plan some projects that we will use to create a roadmap.



Workshop Exercise – Assessment – General



Use this worksheet and the next two pages to think about some strengths and weaknesses, and needed improvements for your contact center. These worksheets are meant to encourage thought – shoot for a few good observations – don't attempt to complete all pages.

What Works?		Why Important?
What Doesn't Work?		Why Important?
What Challenges Do We Have?		Why Important?
How Would We Like To Operate in the Future?		Why Important?
What Do We Need?		Why Important?

Workshop Exercise – Assessment – Tools



Let's think about your contact center's tools... what are some strengths, weaknesses, and opportunities for improvement?

	Meeting Needs? (1-5)	Integrated w/other systems? (1-5)	Challenges/Strengths	Needed Improvements & Why Important
Interactive Voice Response				
Contact Routing & Queuing				
Agent Workstation				
CRM				
Knowledge & Learning Mgmt.				
Staff Collaboration				
Vehicle & Driver Management				
Quality Management				
Reporting & Analytic				

Workshop Exercise – Assessment – Business Functions



Let's think about your contact center's business functions and pick a few to focus on... what are some strengths, weaknesses, and opportunities for improvement?

Business Function	Meeting Needs? (1-5)	Proper Training? (1-5)	Challenges	Needed Improvements & Why Important

Service Delivery

- Contact Mgmt.
- Customer Comm. Mgmt.
- Case Management
- Agency Ops Coordination
- Knowledge & Process Mgmt.

Operational Support

- Technology Support
- Quality Management
- Forecasting
- Process Improvement
- Reporting & Analytics

Staff Support & Governance

- Training
- Staff Communication Mgmt.
- Workforce Mgmt.
- Project & Portfolio Management

Workshop Exercise – Vision

Thinking about strengths, weaknesses and opportunities to improve... Envision a new and improved contact center and describe what is better.



Our Contact Center of the Future is So Much Better Because...

#	In the future we do this...	Why is this Important?	What Tools, Channel or Business Functions are changed?	Priority H/M/L
1				
2				
3				
4				
5				

Workshop Exercise – Strategy & Roadmap



Create three projects or initiatives that would help you accomplish some of your Vision from the prior page. Don't get stuck – make up example info or ask a colleague...

Project 1

Project Description & Goals	Describe the project. What improvements parts of the Vision will it support from the prior page?
Project Scope	Anything that is specifically included or excluded?
Schedule	How long might this project take?
Budget	How expensive might this project be?
Resources	What team members need to be involved?
Other Notes	Anything else to add about the approach? Vendors assistance? Internal team? Cloud based tool?

Example Project Types

Research – RFIs, Vendor Demos, Agency Visits, Online Research

Operational Assessment – Creating teams to review operations and make suggestions.

Procurement – Developing RFPs and procuring services and products

Process Improvements – Creating new manuals, instructions, workflows, responsibilities

New Tool – Implementing a new tool or feature

Training – Creating and delivering training materials

Reporting & Analytics – Cleaning up data and creating tools for managing and assessing operations

Workshop Exercise – Strategy & Roadmap



Create three projects or initiatives that would help you accomplish some of your Vision from the prior page. Don't get stuck – make up example info or ask a colleague...

Project 2

Project Description & Goals	Describe the project. What improvements parts of the Vision will it support from the prior page?
Project Scope	Anything that is specifically included or excluded?
Schedule	How long might this project take?
Budget	How expensive might this project be?
Resources	What team members need to be involved?
Other Notes	Anything else to add about the approach? Vendors assistance? Internal team? Cloud based tool?

Example Project Types

Research – RFIs, Vendor Demos, Agency Visits, Online Research

Operational Assessment – Creating teams to review operations and make suggestions.

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New Tool – Implementing a new tool or feature

Training – Creating and delivering training materials

Reporting & Analytics – Cleaning up data and creating tools for managing and assessing operations

Workshop Exercise – Strategy & Roadmap



Create three projects or initiatives that would help you accomplish some of your Vision from the prior page. Don't get stuck – make up example info or ask a colleague...

Project 3

Project Description & Goals	Describe the project. What improvements parts of the Vision will it support from the prior page?
Project Scope	Anything that is specifically included or excluded?
Schedule	How long might this project take?
Budget	How expensive might this project be?
Resources	What team members need to be involved?
Other Notes	Anything else to add about the approach? Vendors assistance? Internal team? Cloud based tool?

Example Project Types

Research – RFIs, Vendor Demos, Agency Visits, Online Research

Operational Assessment – Creating teams to review operations and make suggestions.

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Process Improvements – Creating new manuals, instructions, workflows, responsibilities

New Tool – Implementing a new tool or feature

Training – Creating and delivering training materials

Reporting & Analytics – Cleaning up data and creating tools for managing and assessing operations

Workshop Exercise – Strategy & Roadmap

Let's wrap up with a Road Map picture. Let's draw some boxes describing the order in which we might implement the projects. They may be in consecutive order or in parallel. One project may be dependent on another to complete before another begins – or maybe you have limited resources.

