

Contact Center
Center of Excellence

Playbook



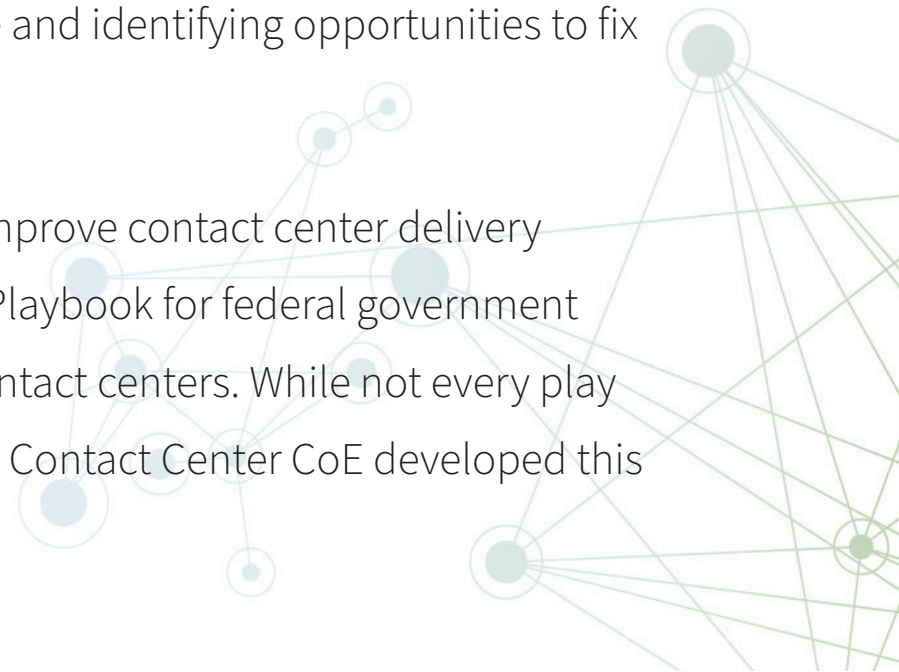
IT MODERNIZATION
Centers of Excellence

Introduction

The federal government spends over \$20 billion a year on contact centers, primarily on outdated technology and processes. Improving customers' experience when accessing, engaging, and interacting with an agency through contact centers will have a significant impact on their overall experience with government. Our customers deserve seamless support in accessing government services to complete their transaction or accomplish their task.

The President's Management Agenda (PMA) and Cross-Agency Priority (CAP) goals showcase the government's focus on improving the customer experience when accessing information and services. Contact centers play a crucial role in an agency's CAP goal strategy, since they are a critical touchpoint to understanding the customer experience and identifying opportunities to fix or improve.

The Contact Center Center of Excellence (CoE)'s team helps improve contact center delivery services and customer interactions. We developed a 15-play Playbook for federal government agencies who are looking to modernize and optimize their contact centers. While not every play will apply to your agency, these plays will get you started. The Contact Center CoE developed this Playbook according to relevant laws, policies, and guidance.



Key Concepts

Throughout this document, we will use the following key concepts:

- **Artificial Intelligence (AI)** – A group of technologies that when combined can automate time intensive and often expensive tasks to do by hand. These technologies fall into two groups: technologies that improve perception (the ability to recognize, such as natural language processing) or improve cognition (the ability to interpret and solve problems, such as machine learning).
- **Customer Relationship Management System (CRM)** – A tool to capture, consolidate, and analyze data on customer interactions. Its goal is to help organizations recognize and communicate with customers.
- **Emerging Technology** – Cloud-based emerging technologies driven by private-sector investments are revolutionizing the contact center space.
- **Knowledge Management** – A discipline that promotes an integrated approach to identifying, capturing, evaluating, retrieving, and sharing all of an organization's information assets. These assets may include databases, documents, policies, procedures, and previously uncaptured expertise and experience in individual staff members.
- **Omni-Channel** – Integration that enables a consistent brand experience regardless of the technology or method of communication customers choose to use. It also enables seamless transition among various contact channels (e.g., data from an email must be usable by an agent that later has a phone call with the customer).



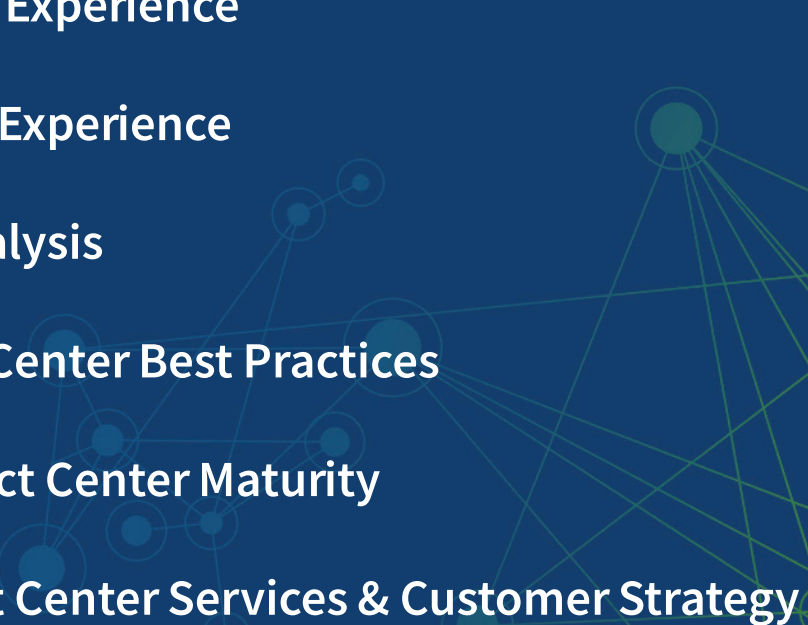
Key Concepts

- **Quality Monitoring** – Listening to an agent's telephone calls to assess the quality of work associated with the call measures customer service skills, accuracy of information provided, Standard Operating Procedures (SOPs), and data entry.
- **Training** – Thoroughly training customer service representatives from the beginning saves time, increases first call resolution, prevents mistakes, and reduces the number of repeat callers.
- **Workforce Management** – The art and science of having the right number of agents, at the right times, to answer an accurately forecasted volume of incoming calls at the service-level standard set by the contact center.



Contact Center Plays

PLAY

- 1 Inventory Contact Center Inventory
 - 2 Assess Customer Landscape
 - 3 Assess Workforce Structure
 - 4 Assess Employee Experience
 - 5 Assess Customer Experience
 - 6 Conduct Cost Analysis
 - 7 Identify Contact Center Best Practices
 - 8 Determine Contact Center Maturity
 - 9 Integrate Contact Center Services & Customer Strategy
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- A decorative network diagram in the bottom right corner of the slide. It consists of numerous circular nodes of varying sizes, some solid green and some outlined in green. These nodes are interconnected by thin, light green lines, creating a complex web-like structure that suggests a network or system architecture.

Contact Center Plays

PLAY

- 10 Design Future State Vision
- 11 Develop Future State Roadmap
- 12 Determine Contracting Model for Contact Center Services
- 13 Build and Maintain Enterprise-wide Knowledge Solution
- 14 Leverage Innovative Technology
- 15 Promote Change Management and Continuous Improvement



Inventory Contact Center

Inventory all contact centers and other entry points to get a necessary foundation. That foundation will allow you to extend current state research, and give insight into current state oversight and fragmentation of contact centers.

To understand your agency's current contact center landscape, you'll need to first identify the stakeholders involved in managing the contact center. Next, list any research targets for the current state assessment (e.g., sites to visit, costs to assess, channels to consider). Last, agree on a common definition of a contact center to use for the project's duration (e.g., any communications channel or group of channels through which personnel respond to inbound inquiries from external customers).

KEY QUESTIONS

- How many contact centers and entry points does your agency have?
- Does your agency have an enterprise-wide view of your contact centers?

CHECKLIST

- ☐ How does your agency define a contact center?
- ☐ Through what communications channels does your agency address inbound customer inquiries?
- ☐ How many contact centers does your agency have?
- ☐ Are these contact centers formal or informal?
- ☐ How many formal contact centers does your agency have?
- ☐ How are formal contact centers differentiated (e.g., by program area)?
- ☐ Does your agency have centralized oversight over all contact centers?
- ☐ Which organization(s) or individual(s) oversee your agency's contact centers?
- ☐ How many entry points (1-800 numbers, service centers, email addresses, etc.) does your agency have?
- ☐ If you outsource contact centers, what is the contract model, number, and period of performance for each outsourced contact center?

Assess Customer Landscape

Insight into customer segmentation and preferences will enable your agency to understand which customer needs they are currently serving and which they are ignoring. Eventually, these needs will inform the development of an experience tailored to the agency's unique customer base.

To assess the landscape, you'll need to understand who your agency's contact centers serve. Then, determine their overall mission and focus of the agency's contact centers. Identify what you need to do to successfully serve these customers. Finally, you'll need to understand the agency's current approach to customer research.

KEY QUESTIONS

- Who uses your agency's contact centers?
- Where will the budget for initial cloud investment come from?
- Why are they using your agency's contact centers?

CHECKLIST

- ☐ What information is your agency currently collecting on customers and their preferences?
- ☐ How is this information used?
- ☐ What tools do you use now to conduct customer research (e.g., surveys, focus groups)?
- ☐ What customer segments does your agency serve?
- ☐ Does your agency have any legal obligation to work with these customer segments?
- ☐ What percentage of overall contact center activity is made up by each customer segment?
- ☐ Are there non-customer external constituents who use contact centers (e.g., partners)?
- ☐ Does your agency prioritize certain customer interactions over others?
- ☐ Which contact channels do customers prefer to use?
- ☐ What are the most common questions?

Assess Workforce Structure

Contact centers require customized staffing scenarios that consider factors such as inquiry complexity, channel types, customer preferences, necessary and available skills, and contact cadence. Understanding an agency's workforce dynamics clarifies how to best address these factors.

To assess the structure, you'll want to identify the current workforce breakdown. Find out if they assess their staffing needs and if they are currently met, missed, or exceeded. Then gather information to estimate workforce costs and understand the policies and dynamics (e.g., union) that affect staffing.

KEY QUESTIONS

- What is the staff composition (number of federal staff and contractors) of your agency's contact centers?
- What are your contact centers' staffing requirements?

CHECKLIST

- ☐ How many agents and supervisors are in each contact center?
- ☐ How many management personnel (e.g., site directors, quality managers) are in each contact center?
- ☐ How many personnel are federal employees?
- ☐ How many personnel are contractors?
- ☐ What is the contact center's grade or SCA structure?
- ☐ What are the required skills (e.g., technical, language)?
- ☐ Are there any skill gaps?
- ☐ How are agents scheduled (e.g., workforce management tool)?
- ☐ What is the telework policy for agents or other staff?
- ☐ What union restrictions affect staffing?

Assess Employee Experience

Understanding employee experience provides critical insight into the root causes of customer experience failures and gaps. This understanding will make it easier to improve process, training, and evaluation to support a more customer-centric workforce.

To assess employee experience, first analyze the connection between customer experience and employee experience at the agency, as happy employees lead to happy customers.

Identify specific tools and processes to improve to get a more empowered workforce. Assess the current landscape for employee performance evaluation. Then learn how agents are trained and identify training gaps.

KEY QUESTIONS

- Does your agency empower employees to provide excellent customer service?
- Does your agency use the right tools to assess employee experience?

CHECKLIST

- ☐ How does your agency or contractor measure employee engagement?
- ☐ Are your employees engaged and satisfied?
- ☐ How engaged and satisfied are your employees?
- ☐ Do employees use tools and processes (e.g., CRM, knowledge management) to support inquiry resolution?
- ☐ Are there tools or processes that employees want to have so they can better manage inquiries or streamline operations?
- ☐ How does your agency or contractor measure employee performance?
- ☐ Do performance plans reflect customer-focused goals and competencies?
- ☐ How are employees recognized for customer-focused achievements?
- ☐ What is your agency's training structure for agents?

Assess Customer Experience

To improve the contact center customer experience, your agency must first understand how contact centers fit into your customers' overall journey.

To assess the customer experience, you'll need to agree on a common understanding of customer experience and your contact centers' role in it.

Create a current state customer journey map (or maps). This map will help you understand which factors impact customer experience inside—and outside of—contact centers. Then you can identify customer pain points as you prioritize recommendations.

KEY QUESTIONS

- Does your agency empower employees to provide excellent customer service?
- Does your agency use the right tools to assess employee experience?

CHECKLIST

- ☐ What touchpoints do customers have with your agency?
- ☐ What are the key interactions that inform or change customers' impressions of the agency (moments of truth)?
- ☐ How are customer interactions linked across channels and programs?
- ☐ Does your agency answer calls or emails soon enough for your customers?
- ☐ Are these responses accurate?
- ☐ Are agency representatives (e.g., CSRs) friendly and helpful?
- ☐ Which technologies directly (e.g., telephony) or indirectly (e.g., CRM) impact customer experience?
- ☐ What are your customers' greatest pain points during their contact center experience?

Conduct Cost Analysis

When assessing a contact center's current state, consider not only tangible but also intangible costs, which are costs that may not be fully reflected in financial data, but have real impact on spending and service. Considering both costs will help you identify opportunities to save.

To calculate your agency's contact centers' cost, you'll need to understand how your agency manages its contact centers. Compare your agency's contact centers' costs to benchmarks, then identify savings opportunities so you can provide a foundation to project future state costs.

KEY QUESTIONS

- How much do contact centers cost your agency?
- What intangible costs do contact centers incur?
- Is your agency's current contact center spending reasonable?

CHECKLIST

- ☐ Who is responsible for overseeing contact center financial systems?
- ☐ What tangible costs do contact centers incur?
 - ☐ Staffing
 - ☐ Facilities
 - ☐ Technology (Licenses, O&M)
 - ☐ Equipment
 - ☐ Training
 - ☐ Translation services
 - ☐ Overhead
- ☐ What intangible costs do contact centers incur?
 - ☐ Productivity losses (e.g., lost time)
 - ☐ Service failures (e.g., incorrect information)
 - ☐ Risks (e.g., reputational liability)
- ☐ How do your agency's contact centers' costs compare to best-in-class contact centers?

Identify Contact Center Best Practices

Understanding contact center best practices will allow your agency to identify gaps and develop a future state vision that supports best-in-class people, processes, and technologies.

To identify best practices, you'll need to establish a benchmark vision of your agency's ideal contact center, tailored to your agency's unique needs. Then define the ideal state against which to compare the current state. Identify success factors that you can adopt. Last, you show that transforming your agency is possible by sharing examples of peer agencies' successes.

KEY QUESTIONS

- What does contact center success look like?
- How have peer agencies achieved this ideal?

CHECKLIST

- ☐ What makes certain contact centers succeed in the following areas?
 - ☐ Acquisition support
 - ☐ Change management
 - ☐ Customer Relationship Management (CRM)
 - ☐ Hiring and recruiting
 - ☐ Innovation
 - ☐ Knowledge management solution
 - ☐ Omni-channel experience
 - ☐ Performance management
 - ☐ Quality assurance
 - ☐ Security and privacy
 - ☐ Staffing optimization
 - ☐ Training and development
- ☐ How do leading contact centers with similar missions or constraints approach contact center operations?
- ☐ What has enabled successful contact center transformations in similar agencies?

Determine Contact Center Maturity

Independent assessments of each individual contact center provide granular insights into the enterprise-wide contact center landscape. These granular insights make it easier to analyze gaps and inconsistencies across all contact centers.

To determine the maturity of each, first establish a baseline understanding of the tools, standards, and processes each contact center uses.

Then compare contact centers to each other in order to identify internal best practices to share. Compare agency contact centers to best-in-class contact centers to identify opportunities to improve.

KEY QUESTIONS

- What people, process, and technology improvements can your agency make to improve operational efficiency and customer experience?

CHECKLIST

- ☐ How does each contact center compare to best-in-class contact centers among the following components?
 - ☐ Agent desktop and Customer Relationship Management (CRM)
 - ☐ Hosting, network, and security
 - ☐ Knowledge/content management
 - ☐ Operations delivery model and operating standard
 - ☐ Operating procedures library
 - ☐ Quality management
 - ☐ Reporting
 - ☐ Telephony platform and Integrated Voice Response (IVR)
 - ☐ Training
 - ☐ Workforce management
- ☐ How varied is contact center maturity across the agency?

Integrate Contact Center Services and Customer Strategy

Contact centers should fit within an enterprise-wide customer strategy that seeks to understand customer expectations, integrate customer touchpoints, and collect—and share—customer data to influence decision making.

To integrate the services into strategy, identify customer experience stakeholders across the various customer touchpoints. Define how contact centers fit into the overall customer strategy. Develop an organizational framework to coordinate customer activities. Then establish a customer data strategy that meets the needs of all relevant program areas.

KEY QUESTIONS

- Does your agency align contact center, customer experience, and digital strategies?
- How can your agency use customer data most effectively?

CHECKLIST

- ☐ Which organization(s) or individual(s) are responsible for overseeing customer experience in your agency?
- ☐ How do organizations responsible for different customer touchpoints (e.g., contact centers, web team, field offices) work together?
- ☐ Does your agency have a customer experience strategy?
- ☐ What Key Performance Indicators (KPIs) does your agency use to measure customer experience?
- ☐ How does your agency collect, analyze, maintain, and share customer data across various customer touchpoints?

Design Future State Vision

Your agency's future state vision should describe the desired customer experience and proposed contact center operations to align the enterprise.

To design the vision, develop the desired future state by:

- Identifying requirements for operational and customer experience success,
- Setting goals for the contact center transformation,
- Anticipating how much the future state will cost,
- Encouraging cross-organizational alignment,
- Describing the benefits of transformation, and
- Providing a foundation for Phase II scope.

KEY QUESTIONS

- How will your contact center operate in the future?
- What will your customers' experience be in the future?

CHECKLIST

- ☐ Which organization within your agency will own the future state contact center organization?
- ☐ Is your agency best served by one or many contact centers?
- ☐ Is your agency best served by an insourced, outsourced, or hybrid contact center?
- ☐ What hours of operation, channels, and services (e.g., TTY) should your agency offer customers?
- ☐ What technologies will your contact center(s) use?
- ☐ What types of questions will each tier answer?
- ☐ How will your agency manage your knowledge management solution?
- ☐ What will the customer journey be?
- ☐ How will data be maintained and leveraged?
- ☐ What impact will the solution have on the budget?

Develop Future State Roadmap

Your future state roadmap provides actions you can take to progress toward your agency's future state vision. Include detailed plans and timelines for addressing gaps between the current and future states.

You'll need to:

- Identify gaps between the current and future states,
- Determine the steps necessary to achieve the desired vision,
- Develop a phased approach to implement the contact center transformation,
- Clarify roles and responsibilities of all contact center stakeholders, and
- Inform the next phase scope.

KEY QUESTIONS

- How will the future state vision be achieved?
- When will the future state vision be achieved?
- How will transformation roles and responsibilities be assigned?

CHECKLIST

- ☐ What gaps exist between the current state and the future state vision?
- ☐ Which processes and policies do you need to update?
- ☐ What technology needs to change?
- ☐ How will it change?
- ☐ What workforce shifts will take place?
- ☐ Which organizations and individuals need to be involved?
- ☐ What procurement(s) will the transformation require?
- ☐ How will data be cleaned and migrated?
- ☐ Who will clean and migrate the data?
- ☐ When will milestones be completed (e.g., technology is operational, new contact center stood up)?
- ☐ How will you measure the transformation's success?
- ☐ How will the transformation support continuous improvement?

Determine Contracting Model for Contact Center Services

Contracting for contact centers is a complex process. It often combines services that are not typically contracted together (e.g., CSR staffing and software as a service (SaaS)). Address this complexity by proactively defining your contracting requirements.

To determine the model, first understand the service implications of various contact center contracting options. Then select the contracting model, vehicle, and length to best support your agency's needs, while still ensuring innovation and continuous improvement through the contract language. Finally, prepare to release contact center solicitation(s).

KEY QUESTIONS

- How can your agency create a contract that will best support best-in-class contact center services?

CHECKLIST

- ☐ What types of products and services does your agency need (e.g., CSRs, technologies, change management)?
- ☐ Does your agency prefer to procure a single turnkey contact center solution, or to issue separate contracts for different parts?
- ☐ What contract length will best support your agency's needs?
- ☐ Does your agency have any special restrictions on your agency's contracting process (e.g., congressional approval)?
- ☐ Will a firm fixed price, time and materials, or hybrid contract best fit your agency's needs?
- ☐ Which requirements will your agency release (e.g., statement of objectives (SOW), performance-based contract, performance work statement)?
- ☐ When will your agency release your requirements?
- ☐ Which contracting vehicle (e.g., Alliant 2 Governmentwide Acquisition Contract (GWAC), Enterprise Infrastructure Solutions (EIS), GSA Schedule-IT Category Special Item Number (SIN): Automated Contact Center Solutions (ACCS) 561422) will best support your agency's needs?

Build and Maintain an Enterprise-Wide Knowledge Management Solution

An enterprise-wide knowledge management solution that documents responses to Frequently Asked Questions (FAQs) is an effective resource used in a mature contact center. This FAQ knowledge management solution enables the contact center to answer more questions at the Tier 0 and 1 levels. It also supports consistent and accurate responses.

Before you start building, you'll need to document and share knowledge from different programs and locations to resolve inquiries efficiently, quickly, and accurately.

Tailor the knowledge management solution to the types of inquiries the contact center services gets.

Finally, develop a strategy for continuous editing and content creation that ensures quality and assigns clear responsibilities.

KEY QUESTIONS

- What strategy and processes will drive developing a best-in-class contact center?
- How will your agency maintain knowledge quality over time?

CHECKLIST

- ☐ What knowledge management solution is your agency currently using?
- ☐ How many separate knowledge management solutions is your agency currently using?
- ☐ What kind of content management system (CMS) does your agency use to publish content on the website?
- ☐ Who in your agency is responsible for updating knowledge articles?
- ☐ How does your agency maintain the knowledge article's quality?
- ☐ What article format and templates best serve the types of inquiries that the contact centers field?
- ☐ How long will it take your agency to create a viable knowledge management solution?
- ☐ How can your agency use technology to quickly create a knowledge management database?

Leverage Innovative Technology

Contact centers have many opportunities to improve operations and customer experience through innovative technologies, such as AI (artificial intelligence) and RPA (robotic process automation). Agencies can use strategies such as test-and-learn pilots to drive innovation.

First, identify technologies that can help agents work more effectively, reduce manual processes, and use data. Conduct small-scale implementations of new technologies to evaluate the feasibility, timelines, costs, and challenges associated with a full-scale project (test-and-learn pilots). Then develop evaluation criteria for those test-and-learn pilots. This process will help you infuse a culture of innovation to support contact center operations' continuous improvement.

KEY QUESTIONS

- Which innovative technologies will have the greatest impact at your agency?
- How can you convince your agency to embrace innovation?

CHECKLIST

- ☐ What actions has your agency taken to bring innovative technologies into agency contact centers?
- ☐ What contact center innovations are available?
- ☐ How would they impact business processes, costs, and customer experience?
- ☐ How could innovative technology improve processes?
- ☐ What are the best mechanisms for incentivizing innovation (e.g., value engineering improvements)?
- ☐ How will your agency define success for test-and-learn pilots?
- ☐ Does your agency have cultural issues or skill gaps present that could restrict your agency's use of innovative technologies?

Promote Change Management and Continuous Improvement

Increase your chances of successfully reaching your future state vision by securing buy-in, monitoring performance, adjusting strategy, and developing a structure to foster continuous improvement.

To promote change management, get buy-in for changes and address the fears, risks, and vulnerabilities associated with the future state. Ensure stakeholders are prepared for a new status quo. Then set clear objectives—and hold the contact center responsible for these objectives—and create a structure for continuous improvement.

KEY QUESTIONS

- How will your agency sustain the contact center strategy?
- How will the strategy support continuous improvement?

CHECKLIST

- ☐ Does leadership support the future state contact center vision?
- ☐ How will you communicate the changes to employees, customers, and other stakeholders?
- ☐ What cultural changes need to take place to ensure changes last?
- ☐ How will you define and measure contact center transformation success?
- ☐ How will you measure future state vision contact center performance?
- ☐ Who is responsible for adjusting the strategy if it doesn't meet expectations?
- ☐ What tools or processes can promote continuous improvement?

Additional Resources

- [Contact Center Best Practices \(PDF\)](#)
- [Contact Center Service Catalog \(PDF\)](#)
- [Emerging Technologies in Contact Centers \(PDF\)](#)



Contributors

The following individuals authored or contributed to this Playbook. The organizational affiliations are included for informational purposes only.

The views expressed in this document do not necessarily represent the official views of the individuals and organizations that participated.

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