

# Customer Discovery Cheatsheet

## General Contact Center Operations

### Current CCaaS Usage

- What is your current CCaaS platform & how long have you been using it?

### Volume and Types of Interactions

- What is your avg monthly volume of interactions (calls, emails, chats, social media, etc.)?
- What is the peak volume of interactions during your busiest times?
- Do you anticipate any significant changes in volume over the next 12-24 months?

### Channels Supported

- Which communication channels do you currently support (voice, email, chat, social media, SMS, etc.)?
- Are there any additional channels you plan to support in the near future?

## Agent and Operational Details

### Agent Information

- How many total agents do you have?
- What is the breakdown of full-time vs. part-time agents?
- How many concurrent agents do you need to support during peak times?
- Do you have remote agents? If so, what percentage of your workforce is remote?

### Phone Numbers

- How many phone numbers (DID numbers) do you maintain?
- Do you use toll-free numbers, local numbers, or a mix of both?
- Are there specific number porting requirements?

## Interactive Voice Response (IVR)

### IVR Systems

- How many IVRs do you currently have?
- What functions do these IVRs perform (e.g., call routing, self-service, surveys, etc.)?
- Are your IVRs DTMF-based, speech-enabled, or both? Do you use GenAI?
- Do you require any specific integrations with backend systems for your IVRs?

## Workforce and Quality Management

### Workforce Management (WFM)

- Do you currently use a Workforce Management (WFM) system? If yes, which one?
- What specific WFM features are most critical for your operations (e.g., forecasting, scheduling, adherence monitoring)?

### Workforce Engagement Management (WEM)

- Do you use any Workforce Engagement Management (WEM) tools?  
If so, which ones?
- What are your key requirements for WEM (e.g., gamification, performance management, eLearning)?

### **Quality Management and Compliance**

- Do you have a Quality Management system in place? If yes, which one?
- What are your quality monitoring needs (e.g., call recording, screen recording, speech analytics)?
- Are there specific compliance requirements you need to meet (e.g., PCI-DSS, HIPAA, GDPR)?

## **Technology and Architecture**

### **System Integration and Architecture**

- What are the key systems your CCaaS solution needs to integrate with (CRM, ERP, ticketing systems, etc.)?
- Do you use any third-party technologies for monitoring and managing interactions (e.g., speech analytics, real-time transcription)?

### **Session Border Controllers (SBCs)**

- What Session Border Controllers (SBCs) do you currently use?
- Are you open to changing your SBCs?

### **Carrier Relationships**

- Do you have existing carrier relationships you want to maintain?
- Are you open to exploring new carrier options?

### **Compliance and Security**

- Do you use any third-party technology for ensuring compliance (e.g., PCI compliance, HIPAA compliance, payment processing over the phone)?
- What are your security and compliance monitoring requirements?

## **Technical and Infrastructure Details**

### **Network and Connectivity**

- What is your current network setup (e.g., MPLS, SD-WAN, VPNs)?
- Do you have any specific requirements for network redundancy and failover?
- Disaster Recovery and Business Continuity
- What are your disaster recovery and business continuity plans?
- Do you require specific features for redundancy and failover in your CCaaS solution?

## **Financial and Business Considerations**

### **Budget and Cost Expectations**

- Do you have a budget range or cost expectations for the new CCaaS solution?
- Are there any specific financial constraints or considerations we should be aware of?

### **Future Plans and Scalability**

- What are your future plans for the contact center in terms of growth and expansion?
- Are there any upcoming projects or changes that could impact the CCaaS solution requirements?

### **Operational and Support Requirements**

#### **Support and Maintenance**

- What are your expectations for support and maintenance from the CCaaS provider?
- Do you require 24/7 support, or are there specific support hours you need?