EBOOK

The contact center playbook: A practitioner’s guide

Five pros break down how to set up and run a successful contact center

dialpad.com ↗

Setting up a contact center is a critical step on the path to success for any business—and that doesn't mean just slapping a phone number to customer service on your website and calling it a day.

Consumers and business leaders today expect to receive a more comprehensive level of service than in the past. Organizations that don't live up to those expectations are finding themselves missing out on valuable opportunities.

Whether your organization is B2B or B2C, being able to deliver timely, effective, and personalized support to your customers isn't just a way to differentiate yourself from competitors. It's also how you deliver the kind of stellar experience that turns one-time customers into lifers

If your team is putting together its first contact center, or overhauling your existing one, this playbook breaks down everything you'll need to know—tried and tested and by the pros.

Contents

Ch 1:

Setting up a contact center: A step-by-step guide

With Mike Monteiro, Senior Manager of People Operations at Education First

Setting up a contact center might seem overwhelming at first, but it doesn't have to be.

The hardest part is getting started.

We've helped hundreds of organizations build their contact centers over the years. One of them being Education First (EF), a large international education company with multiple contact centers and offices.

We chatted with Mike Monteiro, Senior Manager of People Operations at EF, about how he set up their contact center, and his advice to others doing the same. Here's what he had to say.

Step 1: Make a map of what you want

Our contact center is a little more complicated than probably most. But for us, it was basically outlining a picture of what we wanted and then building backwards.

Start simple. Ask yourself and your team how your future contact center should work. What should happen when a lead or customer reaches out to your contact center? What kinds of questions might they have? What information might the customer need from your team? What recordings will your team need to create?

As you're asking and answering these questions, map everything out. Grab some markers and sticky notes and find a whiteboard or your favorite notebook—then start plotting.

Once we mapped out how our contact center should work at a high level, we were able to determine where calls should be routed depending on volume and the time of day. Calls that come in between 9 and 11 in the morning get routed to our Boston office. If Boston is maxed out between 11 and 4, calls get routed to our Denver office instead since it's open at that time. And calls after 4 are routed solely to Boston again.

EF is a large international company with multiple contact centers in different regions, so our setup is more complex than most. You don't need to get overly technical during this step, but get as detailed as you think is necessary.

Every organization is unique and the goal of this step is to figure out how your organization needs its contact center to function.

Step 2: Find a tool that’s going to enable the flexibility that you want

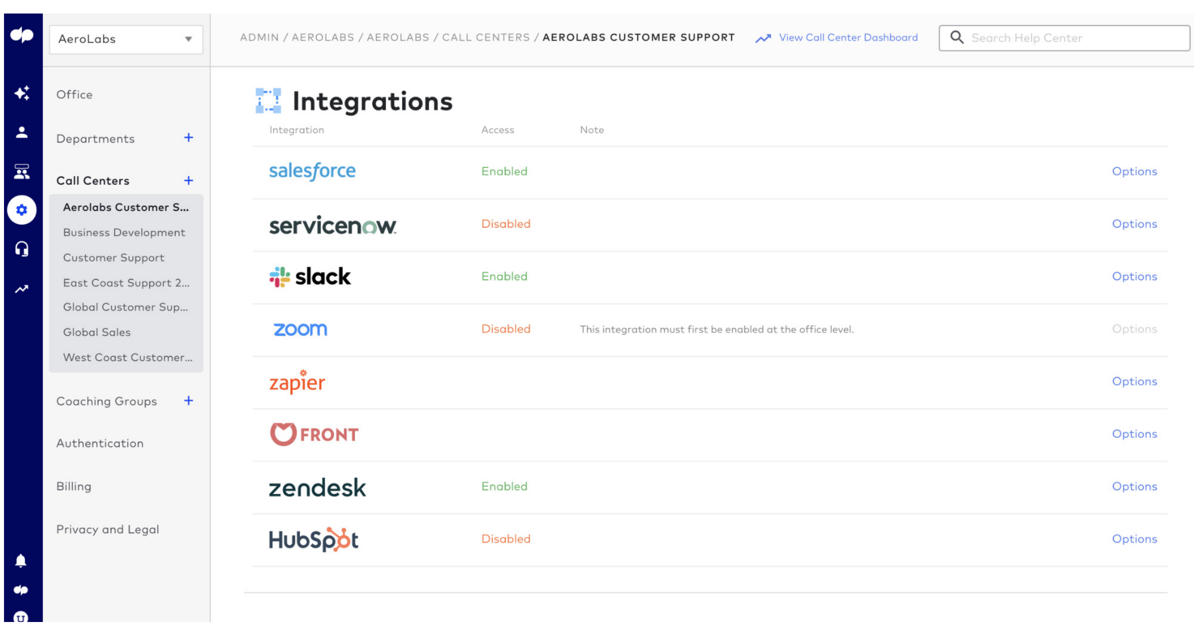
Once you have a map of how you need your contact center to work, it’s time to find a platform or system that lets you put it to work

Tools like Dialpad make it easy to integrate other services your team might already be using, like Salesforce or Slack.

Depending on the platform, system, or service you choose, this can be one of the trickier steps in the process of setting up a contact center. The tool you choose here will go a long way toward either making the rest of your journey easier—or way harder.

Many traditional organizations still rely heavily on a complicated mix of expensive hardware, networking infrastructure, and advanced IT expertise to bring their contact centers to life. For Education First, we turned to a unified communications solution—Dialpad—that not only simplified setup but makes it easy to iterate and adjust on the fly as the needs of our team and organization change.

Before Dialpad, we needed people who really, really knew what they were doing to figure out how to change anything in our contact center. Now, we just go to this website and can do everything ourselves. It’s just so much more user-friendly than most things I’ve seen out there—and I’ve set up multiple contact centers.



Step 3: Build it out!

Once you have your contact center mapped out, your platform or system in place, and your recordings completed, it's time to bring it all together.

The details of this step will vary depending on the contact center platform your organization chose in Step 2. In our case, we use Dialpad, and the process couldn't be simpler. Everything is managed through an online shared workspace for the entire contact center team.

For example, setting up a call center from the Dialpad admin panel only takes a matter of minutes from the moment you click "Create."

During this setup, you can:

Create agents and admins

Add direct phone numbers or additional phone numbers to users

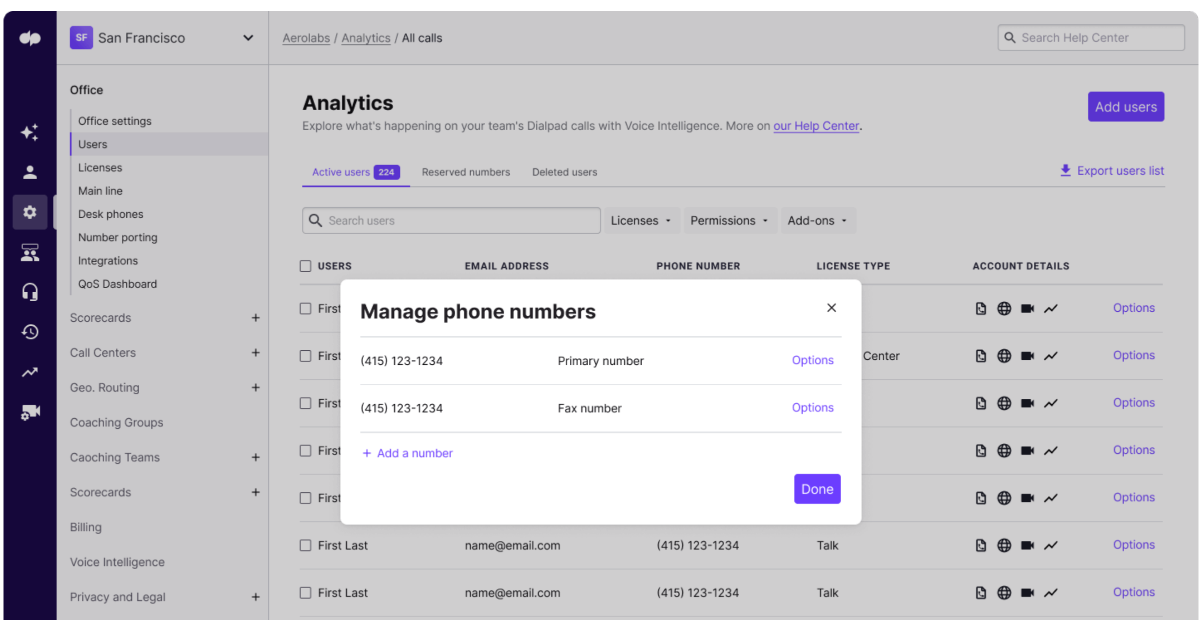
Manage business hours and call routing

Set up Dialpad Ai

Enable integrations with services like Salesforce and Slack

And a whole lot more—all with a few clicks.

If ease of use, flexibility, and not needing to depend on IT for every little change is important to your organization, Dialpad could work for you too.



Dialpad tip: Admissions and enrollment departments in post-secondary institutions can strategically use a contact center to do outreach and get more students. A lot of institutions employ students with little to no training. Dialpad's Real-Time Assist cards could make them exponentially more knowledgeable by automatically displaying suggestions during calls based on defined trigger words or phrases.

Step 4: Make sure everything works

Before you introduce your shiny new contact center to the world, it's time to put it to the test. Put your customer hat on and get on the phones. Go through the contact center experience from their point of view and test every conceivable scenario.

Are you getting the right main menu prompt when you call in? What happens when you press 1? Is the call holding when there's no one available? Try all the different scenarios you can think of to make sure you're getting the results you want.

No matter how well you planned your contact center in Step 1, or how meticulously you set it up in Step 4, chances are you and your team overlooked something. And the best way to find that something is to rigorously test the system out before it goes live.

Advice for managers setting up a new contact center

I have two pieces of advice for anyone setting up a contact center.

First: Try to break it as much as possible. (When it's not live, of course.) If you can figure out how to break it, then you should be able to figure out how to fix it.

Second: Nothing is impossible. You may not see it at first, but there's a way to pretty much do anything you want when you think outside the box.

Ch 2:

Staffing your contact center

With Jude Tungul, Business Operations and Intelligence Manager at Westward360

Setting up the nuts and bolts of a contact center is only half the battle. To create a high-performing contact center that drives real business value and delivers exceptional customer experiences, you need the right people. And while that's easier said than done, there are some simple principles you can follow to put the right people in place.

At Westward360, a leading property management company based in Chicago with an offshore team in the Philippines, hiring their first contact center rep quickly led to additional growth in the team.

We sat down with Jude Tungal, Business Operations and Intelligence Manager at Westward360, about his experience in staffing a contact center. Here's what he shared.

Hiring your first rep

Whether you're planning to retrain an existing team or staff one up from zero, your first hire will be one of your most important decisions. Not only does this person signify the launch of your new contact center, but they'll also set the tone for additional hires who are brought onto the team later.

We didn't really have a customer service team internally. Our main line doubled as a service line run by the same folks that were working our front desk. This was our first go at trying to figure out, "Okay, how do we make sure that the experience that's given to these folks on the main line is an efficient and effective one?"

The answer? We hired a dedicated customer service rep to help manage the main line and direct calls. Within a month, we needed a second hire and within six months we had a team of four dedicated customer service reps!

What to look for when hiring

When you're looking to hire, promote, or reassign the first few reps for your contact center team, you want to look for a specific mix of hard and soft skills that are tailored to your business and industry.

Don't be afraid to set a high standard, either. Your contact center reps will be acting as the face of your organization, so it's critical you find the best possible people for the role.

I generally look for candidates with five to eight years of customer service experience but as an organization, we also leave open the possibility to train those with quick-thinking skills and the right personality traits, like:

Open-mindedness: Can they think critically and come up with multiple solutions to a problem?

Flexibility: Do they know how to adapt when faced with constant change?

Persistence: Will they exhaust every avenue and resource to get the job done?

Knowing when to bend the rules: Can they assess when to make exceptions for the greater good of a customer experience, and ultimately for the company?

Every organization will value a different combination of hard and soft skills, so it's important to spend some time considering what your unique contact center team will need to be successful. Once you have these skills in mind, think about asking candidates to complete a personality test based on the criteria they'll need to be successful in their role.

You might also want to ask them to take a technical assessment to gauge their proficiency with your current tools, or at the very least, their ability to learn the tools in place at your organization.

Onboarding

Setting new hires up for success starts with onboarding. And for contact center reps, the best approach is typically a balanced one. Let them get their feet wet quickly, but don't just throw them into the deep end either.

We don't have new hires go through modules or listen to 25 sample calls before they actually get on our phone lines. They're not going to learn that way.

Instead, newly hired reps work with more senior members of the team to learn the ropes, which for us includes our contact center system, Dialpad. They'll also listen in on calls so they can better understand how to handle certain situations. As early as their second day on the team, they're on the phone for an hour or more, followed by two or three hours the next day.

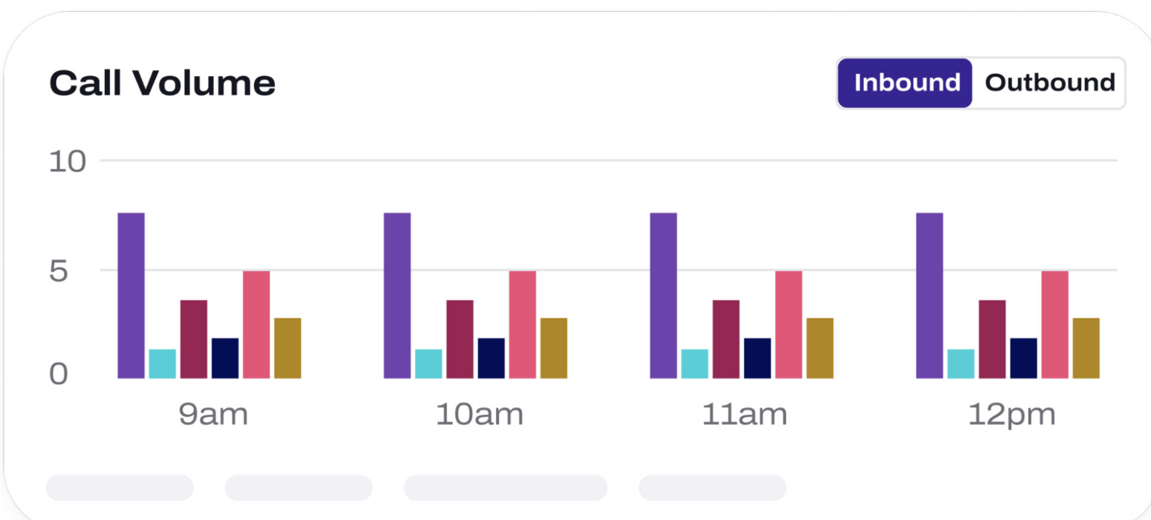
Then we'll say, "Okay let's take a look at this call recording of yours," and give them pointers on what they excelled in and what they could improve next time. Two weeks is what we'd consider our training period but really over the course of six months is where we'd get to know their strengths and what each CSR brings to the table.

Scheduling

Finding the optimal schedule for your contact center takes some fine-tuning. You need enough reps available to handle the volume of calls or messages coming in at any given time, and that volume will always be changing.

If you're just starting out, make some educated guesses and simply adjust as you learn more. Once your contact center has been up and running for a while, you'll begin seeing patterns in call volume.

For example, as a property management company, we know we need more reps available at the beginning and end of the month. That's when calls are very, very high because people are paying rent and bills are coming out. We also know that billing queues will generally be higher between 10:30 am and 2:00 pm. So we schedule accordingly.



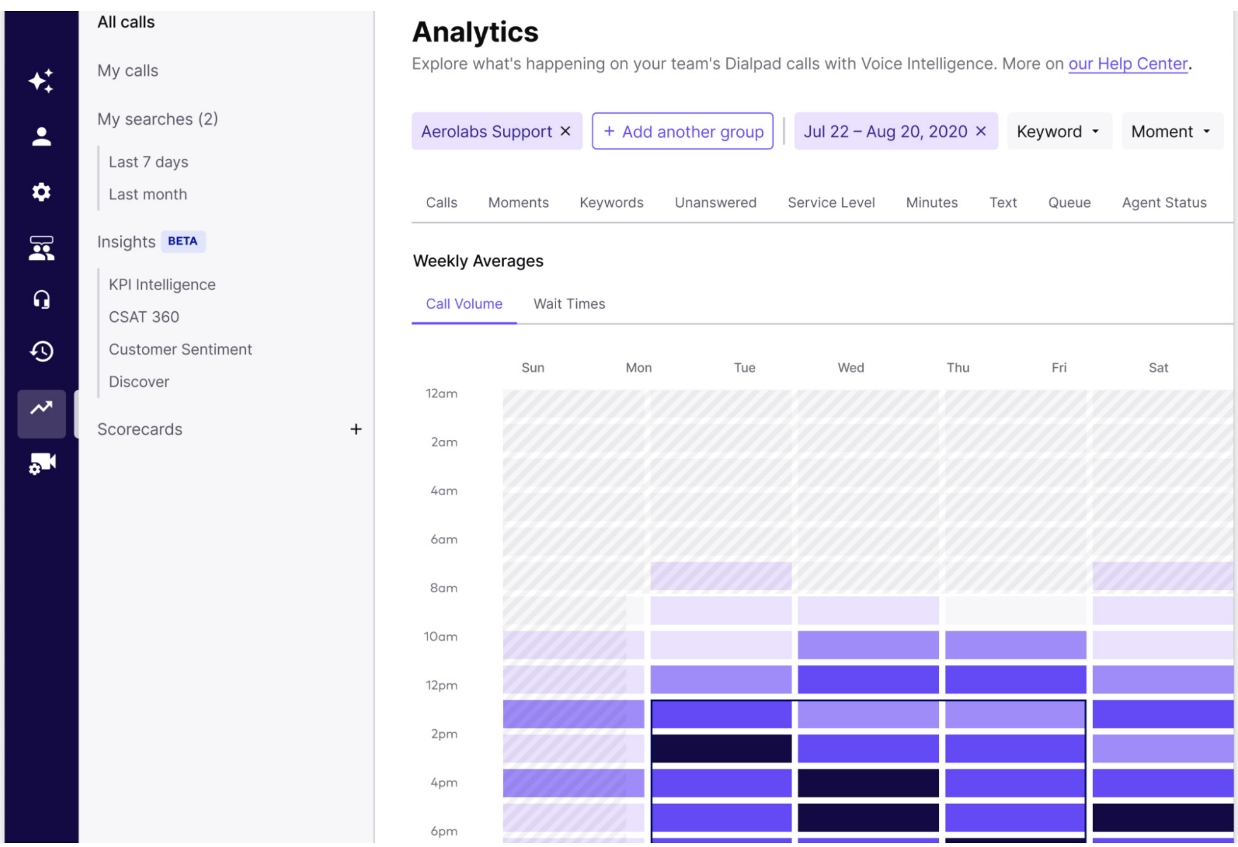
Knowing when to hire more reps

Okay, so you’ve made some educated guesses, scheduled your team, and are learning more about call volume. Now you’re asking yourself the same question every contact manager eventually faces: “Is it time to hire more agents?”

The easiest (and most foolproof) way to answer this question is with heatmaps—a handy tool that’s built right into Dialpad.

Heatmaps turn all of the call volume data being captured into super simple visuals that just about anyone can understand in an instant. In other words, no Excel ninjas required, and you get valuable insights right away.

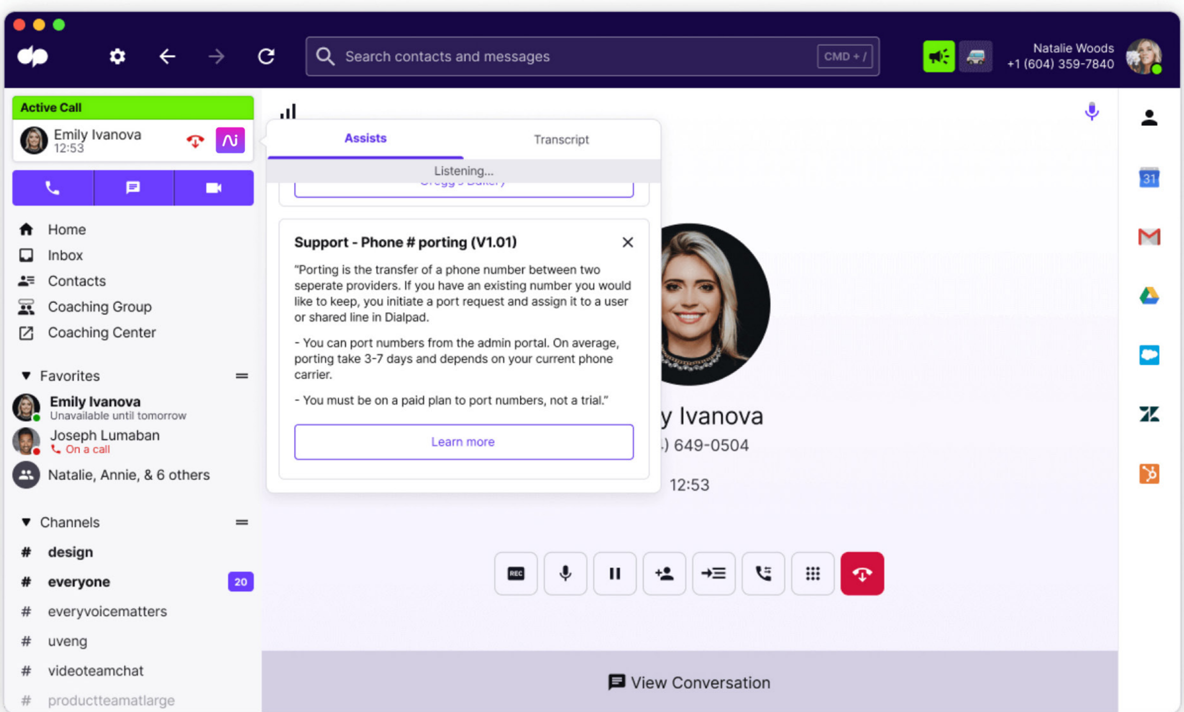
At a glance, you can see which times of the day, week, and month your team is busiest or struggling to keep up with demand. You might decide to hire more agents based on the results, or maybe you just need to make some scheduling tweaks.



Continuous training

The work of a customer service representative can be draining, and at many companies, turnover in the contact center is higher than it needs to be. One of the best ways to keep your customer service team in tip-top shape is to ensure they have all the training, tools, and support they need to perform their jobs well.

Some contact center platforms, like Dialpad, have these training tools built right in. For example, Dialpad's AI provides RTA (Real-Time Assist) cards to reps as they're interacting with a customer. These cards are like a smart sidekick for the customer service rep, giving them key details and info for each specific situation with a customer.



The RTA cards have been an enormous help to us, especially to our newer agents. It's really reduced the amount of time CSRs need to spend going through our knowledge base to figure out how to handle certain customer questions or pausing to find answers. More efficient calls also mean reduced call times.

Advice for managers staffing a contact center

Get into the thick of things. You're not going to truly understand what your contact center agents are going through unless you do the calls yourself. And sometimes that insight is actually even more helpful than taking that 10,000-foot view, only looking at the metrics, or only listening to the call recordings.

Ch 3:

Identifying the essential tools your contact center needs

With Adam Blodgett, Customer Care Supervisor at PetPartners

There's a reason we don't call them "call centers" anymore. Today's customers expect to be able to reach an organization's customer service team in more ways than one, including by phone, email, chat, social media, text message, and video call.

Your team might not use every single one of these channels but your customers should have the choice of several. This gives them the convenience to select the channel that best suits their needs and preferences.

How smoothly your organization handles these different channels all rides on the tools and processes your customer service team is using. With the right tools and processes in place, your team will be set up for success. Without them, things can get complicated fast.

Take PetPartners for example. They have more than 100 agents spread out across 22 different locations. They also have a complex contact center, according to Adam Blodgett, Customer Care Supervisor at PetPartners. But there are four essential tools the PetPartners team uses to keep everything running smoothly. Adam explains:

4 tools every contact center needs

At minimum, there are four essential tools that every high-performing contact center needs to be successful. This is true whether you’re a small company or a large one.

1. Contact center platform

Choosing a contact center platform is one of the most important decisions your organization can make.

You should be looking for a shared online workspace that integrates with all of the other tools on this list, plus any other apps your team might need. In this day and age, though, your contact center can be so much more than a basic repository for tracking customer interactions.

Ideally, the contact center platform you choose also has more advanced features that can optimize your team and set them up for ongoing success. For example, Dialpad’s RTA cards are a great coaching feature that automatically provides reps with the best scripts for common and tough-to-answer questions—in real time. This not only saves them time, but it also helps reps deliver a consistently high standard of customer experience again and again.

2. Instant messaging

Instant messaging is a simple yet powerful tool for any high-performing contact center team, and not only because it enables fast and effective chats. For example, the PetPartners team has set up different group channels to cover all of the needs our rep might have.

Let’s say if an agent needs a supervisor, They can just send a message in a channel that includes all the supervisors and it pings all of us. That’s really helpful when the agents are struggling for help. They can reach us quickly. Even if I’m not sitting at my computer, I’ll get the alert on my phone.

A good contact center will have instant messaging built directly into it (Dialpad does) but there are also alternatives your team can use as well. The key is to select the one that works best for your team within the needs of your organization.

Dialpad tip: Dialpad is a truly unified communications platform, meaning you can talk, have meetings, share messages, and offer support through a single app. Dialpad also has integrated video, empowering contact center agents to live-share their screens to help answer “How do I...?” questions.

3. Email

You might be thinking: "Email? Really? This is an essential tool?"

It might seem like an obvious tool that all organizations are already using but believe it or not that's not always the case. More and more teams now are fully reliant on instant messaging and group chats to share important information. And while this can be faster than email, sometimes it pays to have a paper trail (so to speak) for critical updates.

At PetPartners, our team uses email for exactly this. If something needs to be sent out to the entire team, like a change that's happened, we send out an email to notify everyone.

It's also helpful if the email platform your customer service team uses on a daily basis integrates with the contact center platform they're using. This way contact lists, calendars, emails, and shared documents can all be synced and accessible in the contact center itself.

4. CRM

Last but not certainly not least, your contact center team should be using the same CRM as the rest of your organization. If your sales team is using Salesforce, your customer service reps should be using it too—accessing the same contact records and updating them in real-time.

If you're using a contact center platform like Dialpad, you can integrate it with a CRM like Salesforce, Zendesk, Zoho, or HubSpot for a seamless experience between customer service, sales, and even marketing.

Dialpad tip: When shopping for tools, look into the integration capabilities of each one to make sure they play well together. For example, Dialpad integrates with popular IM platforms like Microsoft Teams and Slack, email platforms like Gmail and Outlook, and CRMs like Salesforce and HubSpot.

Advice for managers looking for the right contact center tools

Managing a contact center can be challenging. But embrace the chaos. Don't be afraid to make the wrong decision. I've learned that, in my time as a supervisor, I'm more respected for making a confident decision, regardless of the outcome.

Ch 4:

Optimizing your contact center

With Zach Glenn, Director of IT Support at ShipEx

If you've made it this far on your journey to set up a contact center, congrats! You've come a long way and massively improved your customer experience. But re-cork that bottle of champagne—your work isn't done yet. Now it's time to optimize, optimize, optimize.

This is a step that ShipEx, a leader in the transportation and logistics services industry, takes seriously. With more than 450 employees and 350 drivers, they must deliver effective and reliable communication across their company. This is what drew them to Dialpad's Artificial Intelligence feature, which provides their teams with evolving and always-learning tools like natural language processing, speech recognition, real-time coaching, and more.

But even if you're not using Dialpad, there are some things any customer service manager can do to continually optimize their contact center.

Zach Glenn, Director of IT Support at ShipEx, has some tried-and-true tips.

Talk to your front-lines

It's simple, it's obvious, it's effective. It's often forgotten. But smart managers know there's just no substitute for talking regularly with their reps.

People might think that managers know what's best for the company. But it's from the people that are down in the trenches—taking the calls and actually doing the processes—that most of our change comes from.

It's not enough to just talk, though. For real insights, you need to have open and honest discussions. And while that sounds great on paper, it's easier said than done.

I recommend scheduling regular one-on-one meetings with your team members, typically weekly or bi-weekly. These one-on-ones not only build rapport and trust but over time they often surface little details or ideas that can turn into big improvements.

Actually implement feedback

When you do get feedback, ideas, or insights from your reps, you need to capture or implement them in a meaningful way. If you don't, your reps will stop sharing things with you pretty quickly and you'll be left in the dark.

Try working feedback and insights provided by your reps into regular training modules, as well as onboarding and SOP documents. Doing this shows your team in a big way their input matters.

Look at the data

When it comes to optimizing a contact center, data is your super-smart friend with all the answers. Well, most of the answers.

But in its rawest forms, data can be intimidating and hard to process. That's why my team uses one particular feature in Dialpad extensively: heatmaps.

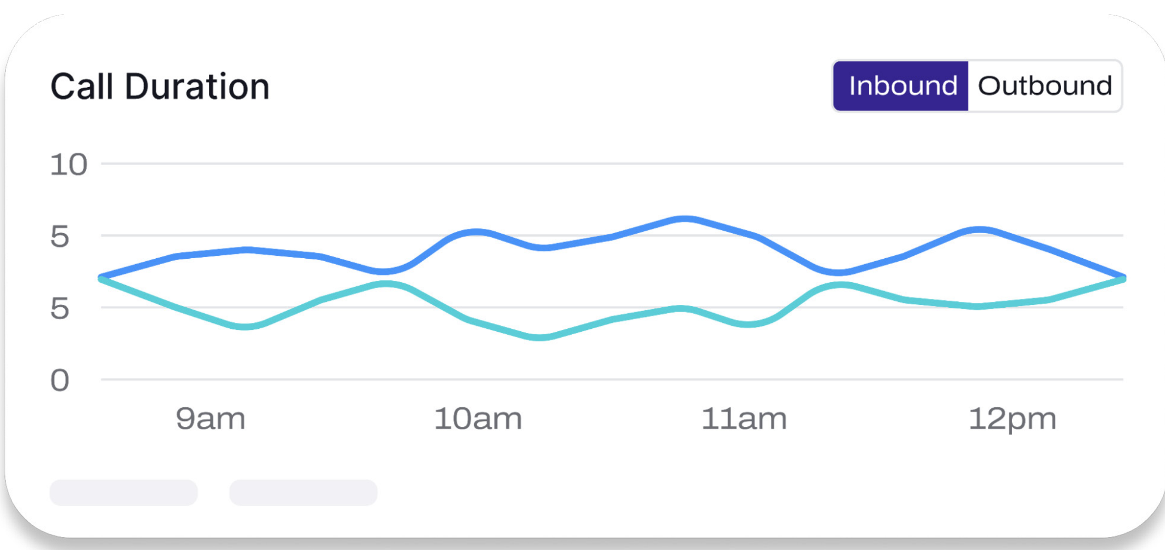
Heatmaps help us visualize call volume, wait times, and concurrent calls to provide a clear picture of peak times (when more reps are needed on hand) and slow times (when scheduling can be lighter).

Of course, that's not the only data or analytics available to managers. With a platform like Dialpad, you can get real-time info on agent performance, customer needs, customer satisfaction, abandoned call rates, call duration, and so much more.

Use call management features

As you optimize the performance of your contact center, call management features can help your team handle volume in new and creative ways. You'll need to experiment to find the combination that works best for your team.

Dialpad tip: With Dialpad, you can easily set up and use smart features like custom call routing, automatic voicemail transcriptions, call summaries emailed to your inbox, and much more.



Take advantage of AI

Not all contact center platforms have built-in AI or machine learning, but if your platform does, it can give your customer service team a real leg-up on the competition. Effective AI tools operate like an assistant for busy reps, allowing them to serve customers faster and more effectively.

When we first started using Dialpad, we had no interest in AI. Over time, though, we figured out what it can do: real-time services like speech recognition, natural language processing, and instant coaching—but the real game-changer for us was transcription.

Having a written, accurate record of a conversation and being able to go back and read what happened... it's eliminated the need to go to IT just to find and hear one second of a call. Everyone can go check themselves, easily.

At the end of the day, we're here to serve the operational needs of our business. This can vary by market or industry but for us, I want to make sure all our agents, drivers, and managers have the tools they need at their fingertips. AI being one of them.

Like I mentioned, I had no interest in AI before. Now I'm thinking, "What else can it do?"

Choose a contact center platform that'll set you up for success

Optimizing a contact center team means making regular changes to processes based on learnings and new business needs. If you're using a contact center platform that's hard to make changes to, or one that requires extensive IT support to make those changes, optimization will be slow and painful.

This was the case at ShipEx before we made the switch to Dialpad.

The system we came from before was super complex. Any time we wanted to make a change, we had to wait a day or two for the request to go through.

With Dialpad, changes big and small are easy and immediate. From onboarding new agents to setting up additional phone numbers to integrating new third-party tools and beyond, everything can be done with the click of a mouse or tap of your finger. No IT experience required (which is great for my team).

For teams that are just starting out on their contact center journey, selecting a flexible platform that enables easy changes and experimentation will pay dividends down the line.

Advice for managers looking to optimize their contact centers

"Optimization means embracing change. Be open to changing up the norm. Just because you were doing something before doesn't mean it's how you have to do it now.

That also means championing the importance of the contact center throughout your organization. I feel like a lot of people's approach to call centers is they're just here to collect calls. What we should be thinking is, "How are we going to change the other end of the user experience?"

Ch 5:

How to measure your contact center's performance

With Brynn Gaeta, Support QA and Development Team Lead at Dialpad

You've probably had your fair share of negative customer service experiences. You no doubt know already what a frustrating feeling it can be when you're stuck on hold for what feels like hours on end. Or when a call agent makes you jump through hoops just to get a simple problem addressed.

As someone who's worked for years in contact centers, Brynn Gaeta, Support QA and Development Team Lead at Dialpad, has been on both sides of this feeling. She also knows that if our customers are feeling like this, they may not be ours for long.

That's where call quality monitoring comes in. Gathering analytics, organizing your data, gauging performance, knowing how to use this data and how to log it—these are all super, super important things for contact center managers.

Here are seven best practices Brynn uses to measure contact center quality and continuously boost performance.

7 best practices for effective quality monitoring

Here are a few ways to create a quality monitoring process that works for your business.

1. Build a quality assurance team that cares

Your QA team will be responsible for establishing your quality monitoring process. Since you're just starting out your contact center, it's quite possible your "QA team" will be just you to start.

Either way, it's important to make sure this team has a deep understanding of your customer experience objectives, as well as a clear idea of how they can help deliver on them.

2. Set quality standards

For your QA team to know what to work towards, you need to set clear quality standards and key performance indicators (KPIs) that your team can use as benchmarks.

Make sure your quality standards cover both customer satisfaction and employee engagement (the latter has a significant impact on the former). Here's what I track:

Customer sentiment and satisfaction

Effectiveness at problem-solving

Agent attitude and tone of voice

Overall brand experience

Overall competency

3. Use scorecards and evaluate rigorously

A call quality scorecard is a useful tool when grading both phone calls and other agent-customer interactions. It lets you grade calls according to a list of relevant criteria, and can help you quickly get to the root cause of any problem that may emerge.

Here are some things we look at in our own scorecards:

Opening conversations: Does the agent open the call correctly in line with general company procedure? Is their tone of voice appropriate? Do they convey helpfulness and a willingness to listen to the customer at the other end of the line?

Identifying problems: Customer issues are far likelier to be resolved quickly if the agent can cut to the chase and identify problems without delay.

Listening to customers: Some agents may tend to run ahead of what the customer is actually saying, and assume their problem is something that it isn't. How well does the agent truly listen to the customer?

Providing solutions: How far do agents go to provide potential solutions for customers and their issues?

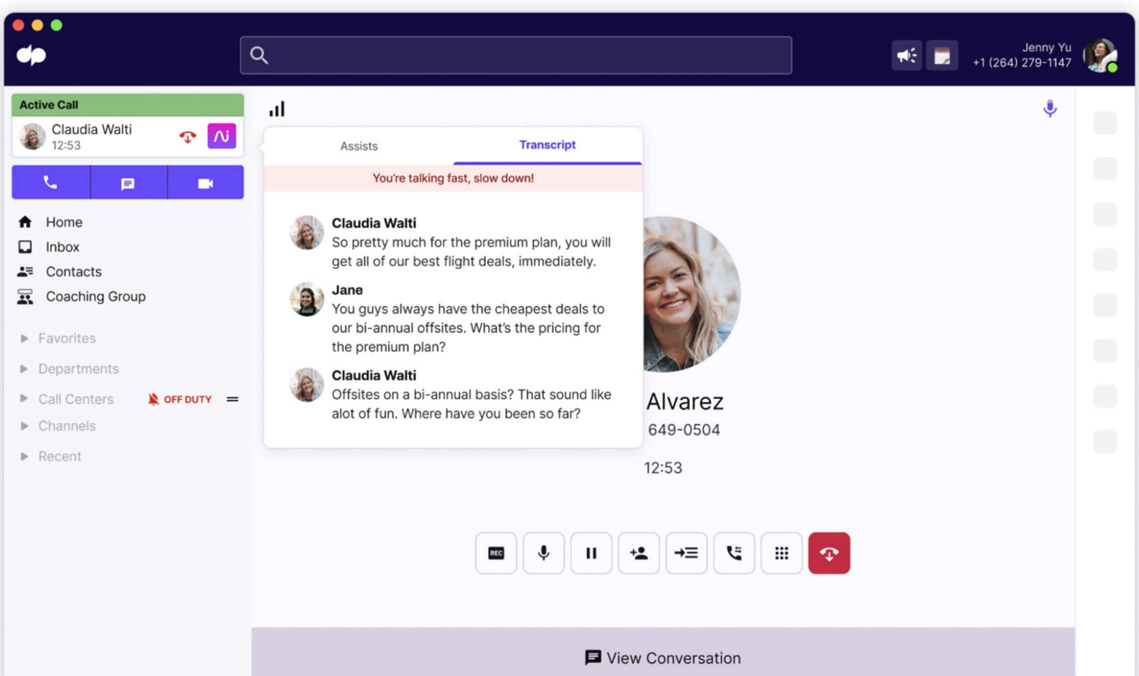
Closing the call: Agents should confirm that all customer issues have been resolved before ending the call, just in case there's something else that needs addressing. Agents should also note key details of the call while it's still fresh in their memory. How concise are these records?

4. Take advantage of technology

I oversee five contact centers—and more agents than I can count on both my fingers and toes. If I didn’t have technology, I wouldn’t be able to do it.

There are tons of technology tools that can help with call quality management. What I love about Dialpad’s quality monitoring tools is that they use artificial intelligence (AI) to make my job of monitoring agent productivity much easier. These tools include speech analytics (are customers mentioning keywords like competitor names?), sentiment analysis (are customers saying positive things or negative things about us?), and speech coaching (is the agent talking too fast or using a lot of filler words?)—all in real-time.

I can then use this data to coach my team better—and at scale—with Dialpad’s handy Real-Time Assist cards.



5. Communicate your findings regularly

Don't keep contact center quality data to yourself—share it with your team! This information tells not only you but also your call agents what they're doing well and, equally importantly, where there are gaps.

And even when there are gaps, it's not necessarily the agents' fault. Maybe it's a training and development issue. As a call center manager, it's important to be able to communicate without blame. We work in a high-pressure, stressful environment, and I know my agents are doing their best.

6. Have a plan for process and employee improvement

Once your quality assessments have been completed, it's time to put them to work. The quality monitoring process—and the information gathered—are a powerful training tool. I cannot overstate that enough.

How will you develop appropriate methods for putting your insights into practice? How will you translate the findings on your agents' scorecards into training and coaching programs? How will you address persistent patterns that crop up throughout your team, rather than among individuals? Your plan should cover all these questions.

7. Have a call center compliance strategy

Compliance: definitely not the most exciting part of running a contact center, but extremely important. If your contact center isn't compliant with applicable laws, you might find yourself on the receiving end of some hefty fines and other penalties.

Some laws are pretty universal, like informing customers their calls are being recorded. But others vary by jurisdiction or industry, so it's important to educate yourself.

Dialpad has a guide that covers many topics on compliance, written in simple (non-lawyer-y) terms. Check it out.

Advice for managers for measuring contact center performance

My advice is to take it one step, one lesson, and one change at a time.

When I first started the QA program, I tried to do everything at once. I was grading and coming out with a ton of training content all on my own. Not only did I get overwhelmed, I created more gaps than there were before.

So come up with a plan first, then execute it in phases. Things will go a lot smoother for both you, and your team.

Want to take Dialpad Contact Center for a spin?

Dialpad is a beautiful place for all your customer conversations. See how easy it is to set up your team with a free demo.

About Dialpad

Dialpad is the leading Ai-powered Customer Intelligence Platform that's completely changing how the world works together. We've created one, beautiful workspace that seamlessly combines the industry's most advanced Ai Contact Center with all the communications tools your team needs to drive ROI. Founded in 2011, more than 30,000 businesses and millions of people worldwide now rely on Dialpad to accelerate their digital transformation. Unlock productivity, collaboration, and customer satisfaction with real-time Ai insights on Dialpad.

Take a product tour