

The Enterprise Contact Center Transformation Checklist

1. Architecture & Core Infrastructure

- ☐ **Cloud Microservices Verification:** Is the target platform natively built on cloud-native microservices (not just legacy software hosted in AWS/Azure)?
- ☐ **Uptime & Redundancy SLAs:** Does the agreement guarantee at least 99.99% uptime with financially backed SLAs, carrier redundancy, and multi-region failover?
- ☐ **API Openness & Extensibility:** Are all system capabilities exposed via documented REST APIs without extra per-call or per-request licensing costs?
- ☐ **Telephony & SIP Flexibility:** Can you bring your own carrier (BYOC) / SIP trunking, or are you locked into vendor-provided PSTN pricing?

2. Technology & Ecosystem Integration

- ☐ **CRM & Ticketing Screen-Pops:** Does the solution natively support bidirectional data sync with your core CRM (Salesforce, Zendesk, ServiceNow, Dynamics)?
- ☐ **Unified Desktop:** Does the agent interface consolidate voice, chat, email, and CRM data into a single window to prevent "swivel-chair" inefficiencies?
- ☐ **Legacy Database Connectivity:** Can your IVR and routing rules securely pull data from on-premises legacy databases or custom data warehouses?

3. Customer Experience & Journey Design

- ☐ **Cross-Channel Context Preservation:** When a customer escalates from digital (chat/SMS) to voice, does the agent receive full interaction history?
- ☐ **Self-Service Task Completion:** Are self-service flows designed for end-to-end task completion (e.g., payment, scheduling) rather than basic status checks?
- ☐ **Omnichannel Routing Consistency:** Are business rules, prioritization, and operational hours unified across all channels in one routing engine?

4. Workforce Management & Operations

- ☐ **Omnichannel Forecasting Accuracy:** Does the WFM engine account for multi-skill agents handling concurrent digital interactions and voice?
- ☐ **Real-Time Adherence & Intraday Management:** Does the supervisor desktop provide real-time schedule adherence alerts and automated intraday re-forecasting?
- ☐ **Flexible Agent Scheduling:** Can the platform accommodate split shifts, shift bidding, and self-service shift swaps via an agent mobile portal?

5. AI, Automation & Containment

- ☐ **NLU/NLP Intent Recognition:** Does the conversational AI/IVR support natural language understanding rather than rigid, rule-based DTMF menu trees?
- ☐ **Real-Time Agent Assist:** Does the platform offer context-aware next-best-action prompts, automated compliance checklists, and instant KB suggestions?
- ☐ **Automated After-Call Work (ACW):** Is Generative AI capability available to automatically summarize calls and draft CRM notes post-interaction?

6. Analytics & Business Intelligence

- ☐ **Raw Data Streaming:** Can raw interaction events, agent status changes, and metric logs be streamed in real-time into your enterprise data lake (e.g., Snowflake, BigQuery)?
- ☐ **100% Speech & Text Quality Analytics:** Does the platform support automated quality scoring across 100% of interactions rather than random manual sampling?
- ☐ **Unified Cross-Channel Reporting:** Are historical and real-time reports unified across digital, voice, and self-service channels in a single dashboard?

7. Security, Compliance & Data Governance

- ☐ **Regulatory Compliance:** Is the solution fully compliant with required industry standards (PCI-DSS Level 1, HIPAA, SOC 2 Type II, GDPR)?
- ☐ **Secure Payment Processing:** Does the IVR support pause-and-resume recording or DTMF masking (agent-side muting) during payment collection?
- ☐ **Role-Based Access Control (RBAC):** Can access privileges, audio recording permissions, and reporting views be scoped granularly by role and region?

8. Migration & Risk Mitigation

- ☐ **Call Flow Inventory & Mapping:** Has every legacy IVR tree, vector, hunt group, and toll-free number been fully documented prior to migration?
- ☐ **Parallel Run / Proof of Concept:** Is there a phased rollout plan that allows running the new platform in parallel with legacy systems for a test cohort?
- ☐ **Rollback & Contingency Plan:** Is there a zero-downtime fallback mechanism to route calls back to the legacy system if cutover issues arise?

9. Vendor Selection & Contract Terms

- ☐ **True Up vs. True Down Licensing:** Does the contract allow flexible license scaling up and down for seasonal volume spikes without penalizing baseline commitments?
- ☐ **Professional Services Scope Clarity:** Are implementation, custom API development, and data migration scopes defined with fixed costs rather than time-and-materials?
- ☐ **Independent Vendor Auditing:** Has an independent, non-vendor-affiliated advisor reviewed the proposal to verify license counts and feature necessity?

10. Financial Strategy & ROI

- ☐ **Cost-to-Serve Benchmark:** Have you calculated your baseline cost-per-contact across voice and digital to measure post-implementation savings?
- ☐ **Total Cost of Ownership (TCO) Model:** Does your 3-to-5-year budget account for software licensing, implementation, ongoing admin, training, and telecommunication carrier fees?
- ☐ **Business Case Realization Metrics:** Are clear key performance indicators (KPIs)—such as AHT reduction, FCR gains, and containment rate, tied to project success milestones?