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The Contact Center Buyer's Guide

What to consider, from AI to integrations

About this guide

The contact center has become the frontline of modern customer service, with businesses of all sizes relying on these platforms to manage their customer interactions. With so many contact center platforms available in the market, choosing the right one can be a daunting task.

However, the choice of platform is critical, as it directly impacts the customer experience, agent productivity, and ultimately, the success of the business.

In this guide, we'll explore the factors to consider when choosing a contact center platform and provide you with the information you need to make an informed decision.

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Ch 1.
Before you shop

Before you even start looking at different vendors, you have to do a bit of preparation. Here are a few key areas to understand.

Your current contact center operations

First, do a thorough assessment of your business need(s) and—if you have one—the contact center platform you currently use. Determine which of its tools and features are useful, what isn't so much, and what it's lacking. This will help ensure your next contact center is an upgrade from your current one. Below are some key questions to ask during this assessment.

To-do:

☐ Understand the exact problems you're planning to solve. (Be precise. "More effective coaching tools" is okay, but "we need a contact center platform that offers real-time coaching and live feedback capabilities" is better.)

☐ Do an initial assessment of the potential challenges of your existing contact center from a scalability and global rollout perspective. This information will help you vet potential vendors.

☐ Know which integrations your team needs. Always look for opportunities to integrate the tools you're using with your contact center. Often, it can expand the abilities of the tools themselves, and makes life easier for your team too.

☐ Know the annual contract cost you're currently paying, including any add-on fees. Compare that against your planned budget for the next 3 to 5 years. (Don't just think about your costs today.)

☐ Forecast expansion potential: You may not need certain functionality now, but what about the near future? For example, you might have a small support team now, but have big growth plans for the next year or two and need a scalable contact center solution.

☐ Review the customer support you're getting from your current vendor. This will help you choose a platform that has good support and avoid past issues. (For example, what support issues are you currently facing, what SLAs would you require, and how soon should issues be resolved?)

☐ Investigate the analytics layers of your current platform. What data are you getting out of your existing environment that's mission critical? What data aren't you getting now that would help you make more informed business decisions?

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Case Study

Fenway Health successfully switched over 600 employees spread out across 15 locations to remote work.

Learn about their rollout strategy ↗

☐ Find out how much your team members like using your current contact center platform. This may seem like it's not very important, but the level of satisfaction here can directly influence whether people actually adopt the tools you choose. One way to do this is by sending out an employee survey to better understand the "adoption pulse."

Your timeline

A timeline isn't just a go-live date. There are many mini-timelines too!

There's the budget timeline. There's the implementation and change management timeline. And of course, there's the cutover from your existing contact center platform and go-live date.

To-do:

☐ Know your timelines (broken down by each step or stage).

The change management required for a seamless transition

The larger and more complex your organization, the more important it is to understand whether you have the internal resources and capacity to onboard, implement, and support the new contact center. And the earlier you can determine this, the better.

To-do:

☐ Determine the services, support, and maintenance model you'd need to help your company adopt a new contact center.

☐ Determine the agent and supervisor training and coaching needs necessary to get them proficient on a new tool.

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Ch 2.
10 Key things to look for in a platform

Now that you've got the lay of the land, it's time to start looking at potential solutions. There are several key things to consider when looking for a contact center platform. Here are ten big ones.
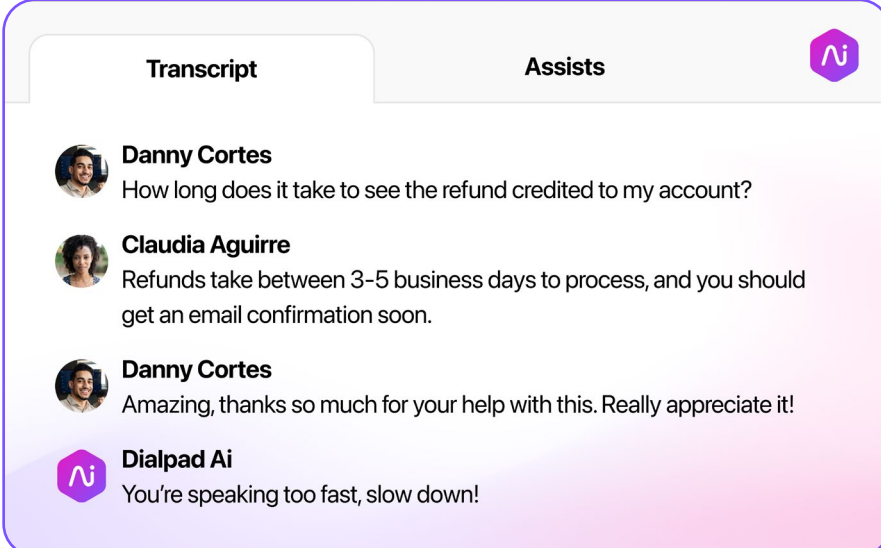
🔍 Example

Dialpad Ai transcribes your calls as they're happening and provides with you with the searchable transcript—along with actions items—after each call (it also gives agents helpful tips during the call, like telling them to slow down if speaking too fast).

1. Real-time transcription

Real-time transcription eliminates the need for your agents to take notes during customer calls, so they can focus on the call itself. It also provides a written record of the conversation that agents can refer back to for more contextualized follow-up interactions, and agents can use for quality and training purposes.

To-do:

☐ Ensure real-time transcription is offered by the contact center provider, ideally for both live voice conversations and voicemail messages.

☐ To make your agents' lives easier, find out if the contact center platform offers call summarization, as this will greatly reduce after-call work time that agents normally spend summarizing their customer conversations manually.

🔍 Example

Dialpad's Ai Recap feature automatically summarizes your calls into a short recap at the end of each conversation:

Kristin called you
Lasted 43 minutes • Ended at 5:04pm

✓ Resolved

Recap | Moments | CSAT 88 | Quality

A customer mistakenly made a payment for a new account instead of renewing an old one. Aerolabs support was able to confirm the customer's old account and cancel the new one.

🔵 Billing   🔵 Refund

Action items
☐ Send an email to the customer once the refund has been processed

Follow up
✉ Email   📱 SMS

↗ View call details

Hi Kristin,

Hope you're doing well. I just wanted to follow up and reassure you that we are working on your refund and you will receive an email once it is processed.

Best,

Claudia Aguirre

✉ Send with Gmail

2. Live agent support + coaching

One of the most important responsibilities for a contact center manager is to make sure that their agents have all the resources they need to succeed. A platform that has live agent support and coaching capabilities built into it will make this easier.

To-do:

☐ Find out what kind of automated support is available to agents while on calls. Are there real-time assistance pop-ups?

🔍 Example

Dialpad offers pre-programmed Real-time Assist cards to provide on-the-fly guidance. There's also Ai Agent Assist, which can understand customer questions and automatically search all connected knowledge sources (even unstructured sources like PDFs and past customer conversations) to find helpful information for agents in real time:
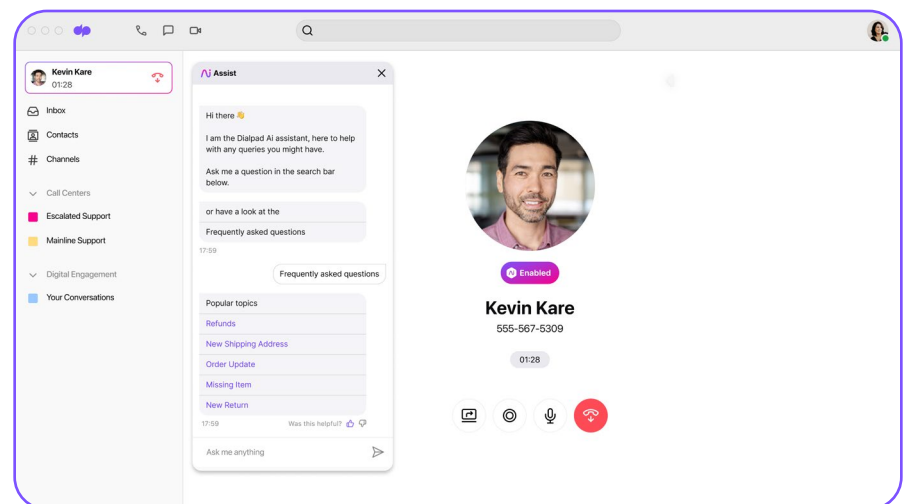
☐ Look for call whisper and call barge features that'll allow you to proactively jump into live calls as necessary, like to help turn a negative customer experience around.

☐ Find out what coaching would look like with this contact center platform. What kinds of tools will be made available to you?

⌕ Example

Dialpad Ai's live coaching features allow supervisors to create coaching call recording playlists and provide support to agents when they need it:
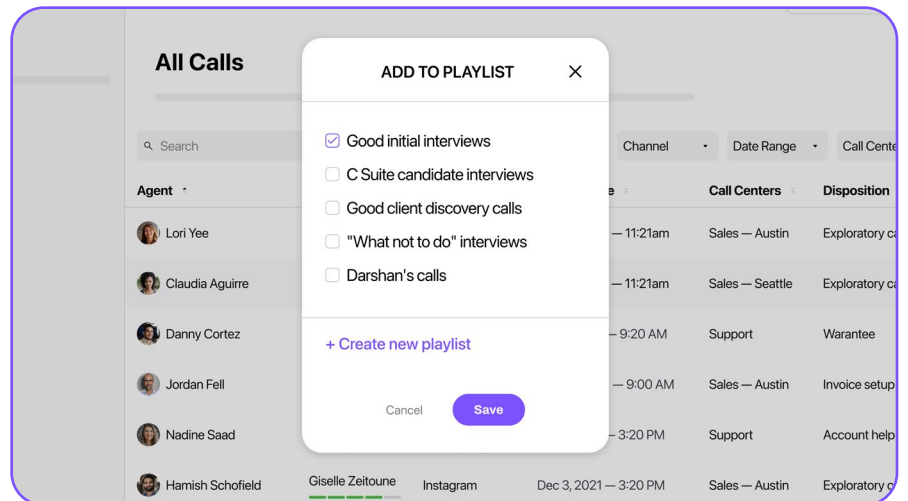
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3. Live customer insights

When supervisors are overseeing agents, they might have tens or even hundreds of live customer calls happening simultaneously. But one person can't monitor everything, so a contact center's ability to flag sentiment in these calls is huge, so you can jump in as needed.

To-do:

☐   Make sure the platform employs AI to pick up on words or phrases to understand the customer's sentiment, e.g. pricing objections or frustration with the support agent.

🔍 **Example**

Dialpad Ai allows supervisors to view how all the live calls are going at a glance, so they can jump in when an agent needs help. On the flip side, this also makes things easier for agents, who don't have to worry about manually messaging a supervisor for help because they know that the call sentiment will be visible already:

Mainline Support

Live calls

Kendal Needham	Danny Cortes	🟢 Positive	Hey, had a quick question about the...	00:30
Claudia Aguirre	Corlos Sainz	🔴 Negative	I am calling because I'm frustated	05:42
Lori Yee	Roberto Perez	🔴 Negative	I need to cancel my account, I have	03:12
Kristin Carlel	Amy Jones	🟢 Positive	What new colorways are available?	06:28
Jason Horton	Fred Lang	🟢 Positive	How long does it take to get a...	04:36

☐ Ensure the platform is equipped to help you collect important KPIs and other customer experience data, like NPS and CSAT scores.

⚲ Example

Dialpad's Ai CSAT feature accurately infers CSAT scores for customer interactions—without needing to rely on customers filling out survey responses. This lets you see how our customers really feel about your service, and alerts you to any fluctuations:

Ai CSAT

Calls	🅰 CSAT

CSAT
98% Satisfied
↑ 2% vs. prev 30 days
572 of 1,114 Handled Calls (51%)

25% Survey Response Rate
572 of 1,114 Handled Calls (51%)

96% Ai Prediction Rate

CSAT Overtime — CSAT ▢ Customer Ratings ▢ Ai Predicted Ratings

CSAT: 98%
24 customer ratings
100 predicted ratings

100%
75%
50%
25%

18   8   22   18   10   18   18   18   20   18   18   20
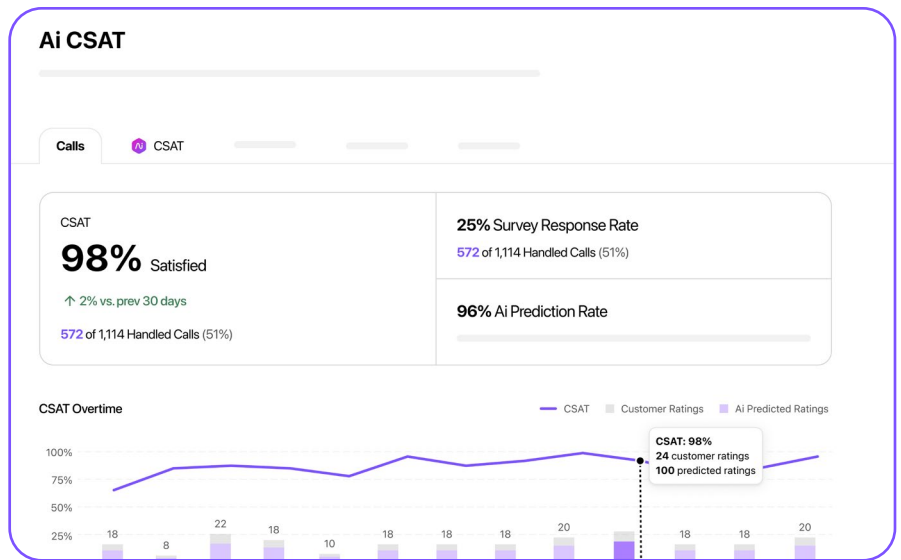
4. Conversational AI

Contact centers with digital self-service capabilities, like chatbots or conversational AI, can deflect a large number of customer calls and messages on their websites and digital channels like WhatsApp.

To-do:

☐ Look for a platform that helps you set up and deliver self-service conversations easily.

⌕ Example

Dialpad Ai makes it easy to provide automated customer service. Simply connect our Ai Virtual Assistant to any structured or unstructured knowledge source. Our conversational Ai will understand customer intent and automatically map a real-time response to their question—no manual intervention necessary:

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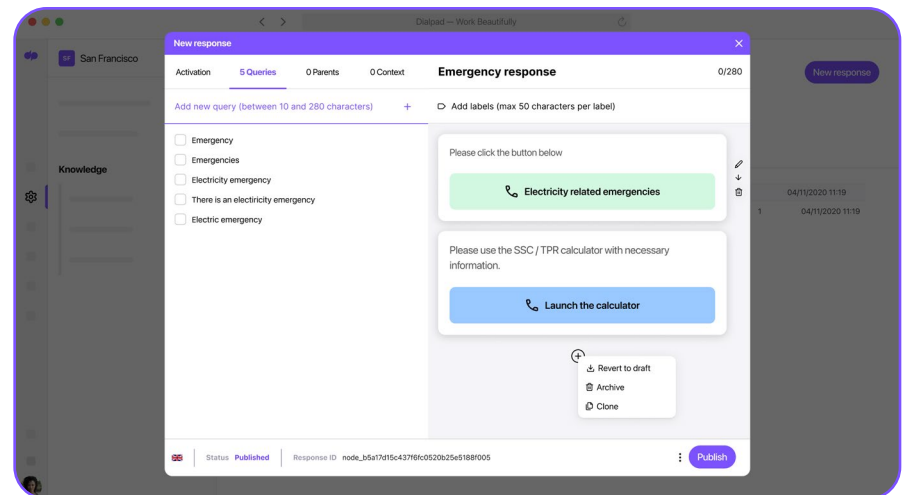
5. Omnichannel communications

To provide good [omnichannel customer service](#), you need a contact center platform that can sync all that contextual and conversational data across voice, video, and digital channels.

To-do:

☐ Look for a platform that supports multiple channels such as phone, email, chat, social media, and SMS, as this will allow your business to provide a seamless omnichannel customer experience.

🔍 Example

Dialpad lets you build better customer relationships and improve agent workflows with Ai transcriptions, real-time coaching, and a unified interface for both voice and digital interactions:
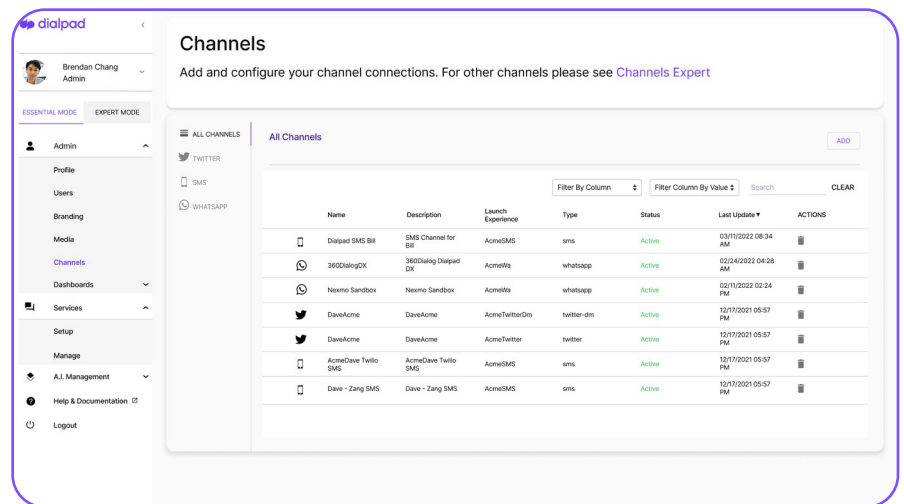
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⌕ Example

Dialpad offers dozens of out-of-the-box integrations, as well as a Zapier integration and open API so you can build custom workflows and bring powerful voice and contact center capabilities to all your apps.

6. Integrations

Choose a platform that integrates with other systems your team is using such as your CRM and helpdesk software, as this will improve efficiency and reduce the need for manual data entry.

To-do:

☐ Check out the list of integrations offered by the contact center vendor. All or most of the tools your sales teams use daily should be on there.

☐ For any tools not on the integrations list, does the vendor offer an open API to build your own?

7. Analytics and reporting

Ensure that the platform offers detailed analytics and reporting, so you can track key performance metrics, identify areas for improvement, and make data-driven decisions.

To-do:

☐ Find out what kind of agent performance data this platform will let you gather, like live sentiment analysis. This will let you jump into calls going down south and help turn them around before it's too late. Other things to look for are agent leaderboards, letting you know which reps are crushing it and who needs a little push.

☐ Find out what kind of customer data this platform will let you gather, like whether it has the ability to track pre-determined keywords (like a competitor name or pricing questions) and alert you when they're brought up in calls. So you can identify trends and train your agents accordingly.

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☐ Find out what kind of metadata you'll be able to gather surrounding customer calls, such as the time of day, length of wait time, and duration of the conversation itself. This data can help you budget resources and schedule more efficiently so more agents are online at the busiest times.

Example

Dialpad gives you a clear overview of how your team is performing at all times, lets you pull custom reports, and offers heatmaps that show call volume patterns and average speed to answer. So contact center managers can see which days of the week are busier than others and schedule the workforce accordingly:
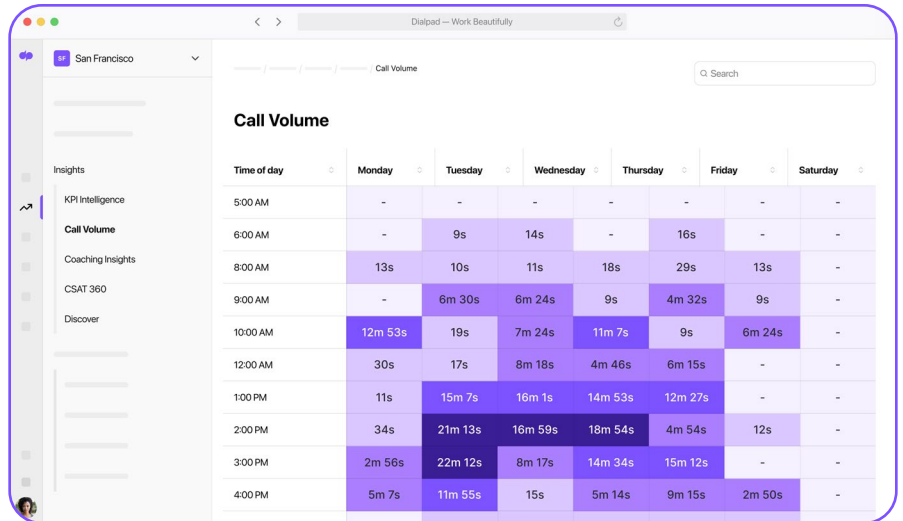
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8. Security and compliance

Ensuring that a contact center platform is secure and compliant is crucial to protecting sensitive customer data and avoiding any legal or regulatory issues.

To-do:

☐ Make sure that the platform encrypts all data in transit and at rest. (Encryption is the process of converting data into an unreadable format, so it can only be accessed by authorized personnel.)

☐ Look for a platform that allows you to control who can access sensitive customer data, and ensure that it has strong authentication and authorization mechanisms in place.

☐ Check if the platform has obtained any compliance certifications, such as CSA, HIPAA, or GDPR. These certifications validate that the platform has met the necessary security and compliance standards.

☐ Make sure that the platform provider has signed a confidentiality agreement that protects your customer data and prevents unauthorized disclosure.

9. Support

It's important to choose a contact center vendor that has a strong reputation for providing excellent customer support. Take the time to do your research and ask the right questions to ensure that you're choosing a vendor who will be a reliable partner for your business.

To-do:

☐ Look at their service level agreements (SLAs). This will outline the level of service they promise to provide. Look for guarantees on things like response times, resolution times, and uptime.

☐ Check their customer reviews on third-party review sites or ask for references from the vendor.

☐ Ask about their support processes. How do they handle support requests? How do they prioritize them? What does their escalation process look like? This will give you an idea of how responsive their support team is.

☐ Consider their communication channels. Look for a vendor that offers multiple communication channels for support, such as phone, email, chat, and social media. This will make it easier for you to get in touch with them when you need help.

🔍 **Example**

Dialpad offers a 100% uptime SLA to its Enterprise plan customers, along with award-winning customer service (available 24/7 for Pro and Enterprise plans).

10. Scalability

Consider whether the platform can easily scale up or down to meet your business needs, as this will allow you to adapt to changing customer demands and seasonal fluctuations in call volume.

To-do:

☐ Find out what the process is for scaling up (or down, e.g., in case you hire seasonal employees during peak months) with the vendor. How easy/difficult is it? Are there any fees involved?

☐ What's the downtime required to scale? This is important as some vendors need you to pause your operations when making changes to your contact center.

🔍 Example

With Dialpad, you don't have to worry about downtime—you can scale up or down as needed to match demand, with zero interruption in your service. That means you can add contact center queues and agents in minutes, pay only for the features you need and use, and enjoy continuous improvements with our automatic updates. You can also expand and integrate with other legacy systems using APIs, Webhooks, and native connections.

Ch 3.
Vetting Providers

Now, it's time to start shortlisting. Generally, at this stage, you should put out an RFP (request for proposal) for at least 2 to 3 contact center vendors that can solve your business needs—and check a lot of the boxes we covered above. This will help you get the best product for the best price.

Grab our [contact center RFP checklist](#) to get started.

Pricing

This seems like a given, but you'd be surprised at how many companies skip this step. Always look for ways to negotiate—not only to get the best price possible, but also to get the most favorable terms for your company.

To-do:

☐ Clarify exactly what's included in the starting price point. Many contact center providers entice customers with a low starting price point, but these entry-level plans don't always include things like customer support, adding or removing users, and repairs though—all of which are inevitable.

☐ Determine the IT requirements. Is the system easy to set up without IT, or will you need a dedicated IT team or contractor to set up and make changes to your contact center? If you do need to hire IT support, how much will that cost each time?

☐ If you open a support ticket with the vendor, is it free? Some companies can charge as much as $75 per support ticket, so be sure to clarify all these things before signing any contracts.

> ♀ **Quick tip**
>
> If possible, combine post-sale services and support as part of your product purchase to get the best discount.

What is 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.

Book a product tour to learn more ↗