#

# **Migration Questionnaire**

1. **What are your business and contact center goals?**
*For example: Increase first contact resolution or use the contact center for upselling.*

|  |
| --- |
|  |

1. **What customer touchpoints do you have?**
*A customer touchpoint refers to any time a customer interacts with your organization. This could be through a website, a service hotline, or the main telephone number.*

|  |
| --- |
|  |

1. **What communication channels are you currently using?**
*For example: Slack, Skype for Business, Email, etc.*

|  |
| --- |
|  |

1. **Identify key scenarios and business processes that could be simplified.**
*For example: Unblock a user by calling a special phone number or automatically (re-)send an invoice.*

|  |
| --- |
|  |

1. **Please list your use cases and process owners.**

|  |  |  |
| --- | --- | --- |
| **Use Case** | **Description** | **Process Owner** |
| For example: IT Helpdesk, Sales hotline or contact center  | For example: The IT Helpdesk does technical support within the organization and has a ticketing tool to keep track of cases and progress. | For example: Head of IT - Walter |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

1. **List all the services that you are currently using.**
*By services we mean the different numbers your organization can be reached through, even if they link to the same team.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Number** | **Name** | **Phone Number** | **SIP-Address** |
| **1** | For example: IT Servicedesk, Sales Global, Contact Center – Claims | For example: +41 123 234 345 | For example: Sip:de\_servicedesk\_it@company.com |
| **2** |  |  |  |
| **3** |  |  |  |
| **4** |  |  |  |
| **5** |  |  |  |
| **6** |  |  |  |

1. **What customer feedback are you currently receiving and through what channels?**
*For example: The IT support predominately deals with password resets through Tickets or customer service keeps receiving complaints about a well-known issue through Email.*

|  |
| --- |
|  |

1. **What tools and processes are intertwined with the contact center?**
*For example: ERP, CRM, ticketing, dispatching, parcel tracking.*

|  |
| --- |
|  |

1. **What metrics do you need to measure your service goals? What metrics are you currently tracking and through what channels? Would you like to measure anything else in the future?**

*For example: SLA for call acceptance or number of lost calls.*

|  |
| --- |
|  |

1. **Are there any regulatory or compliance requirements that need to be considered?**

*For example: Record contact center interactions for training purposes or oblige with any financial requirements such as MiFIDII.*

|  |
| --- |
|  |

1. **What resources (human and financial) can you dedicate to this project?**

|  |
| --- |
|  |

1. **What is your modern work contact center vision?**
*For example: A holistic contact center where all employees can help with customer service.*

|  |
| --- |
|  |