CCaaS solutions enable customer service organizations to manage multichannel customer interactions holistically from customer experience and employee engagement perspectives. Application leaders can learn from the implementation experience of their peers shared on Gartner Peer Insights.

**Overview**

Gartner Peer Insights is a free peer review and ratings platform designed for enterprise software and services decision makers. Reviews go through a strict validation and moderation process to ensure they are authentic.

We analyzed 90 Peer Insights reviews to identify lessons learned implementing contact center as a service (CCaaS) solutions, North America. This report focuses on the responses to the questions: “If you could start over, what would your organization do differently?” and “What one piece of advice would you give other prospective customers?” To browse all reviews, see the full list of Contact Center as a Service, North America, reviews on Peer Insights.

**Peer Lessons Learned**

This edition of “Lessons Learned” summarizes clients’ firsthand experiences with implementing CCaaS solutions, North America. The peer advice results both from successful implementation projects and learnings based on what went wrong. This peer perspective, along with the individual detailed reviews, is complementary to expert research and provides a holistic view to the implementation process. Reviewers who submitted their lessons learned represent a cross-section of small- to midsize and large organizations. (See Figure 1.)

**Figure 1. Reviewer Demographics**
Below are some key lessons learned and most cited recommendations by Peer Insights reviewers to help application leaders in their CCaaS solution’s implementation process.

Lesson 1: Conduct a Meticulous Analysis of Overall Organizational Requirements

Peer reviewers suggest application leaders to analyze and document all the requirements, including outbound and product needs. They further stress on envisioning the state of organization’s requirements for the next few years.

One of them states:

Research exactly what functions you would want in a call management system. Analyze the options that can prove to be the most important for you. These options may include call quality, support, reporting, etc.

— Application Professional, Retail Sector

Another peer states:

Ensure to gain a comprehensive understanding of your interactive voice response (IVR) requirements, such as volumes, agent counts and utilization. This will help you approach the implementation in a much effective way.
Peer recommendations include:

- Define all the variables needed to be captured for upfront reporting purposes.
- Ensure all the stakeholders are closely and constantly involved in the requirements elicitation phase.

Recommended reading:

"Ignition Guide to Capturing Requirements"

"The Digital Future Will Stall Without Customer-Led Automation"

Lesson 2: Evaluate All the Features Offered by Different Vendors

Many peer reviewers recommend application leaders to conduct an in-depth evaluation of different vendors. They emphasize analyzing all the features offered by various solutions.

A peer mentions:

Evaluate the top three vendors in the CCaaS market. Moreover, you need to assess your long-term business needs against these platforms. Along with that, review the size and health of these organizations.

— Infrastructure and Operations Professional, Service Sector

Another one suggests:

Ensure you are doing an analysis of the entire set of features and benefits, then extracting and focusing on those that are important to your business. Just because a salesperson indicates there is a value add for a feature does not mean that it will provide value for your organization. You need to really get down to the minutiae of each
solution and truly make a thorough comparison on those features or functions that are really valuable for your organization.

— Data and Analytics Professional, Service Sector

Peer recommendations include:

- Analyze the support model of different vendors.
- Evaluate integration capabilities of the vendors and assess whether their strategic partners (workforce management vendors, etc.) are able to cater to the present and future requirements.
- Ensuring features are demonstrable and relevant to your market.
- Evaluate the trade-off between feature scope and pricing structures.

Recommended reading:

“Magic Quadrant for Contact Center as a Service, North America”

“Critical Capabilities for Contact Center as a Service”

“How to Choose Your Best-Fit Vendor for Contact Center as a Service”

Lesson 3: Focus on Training the Resources on the Chosen Solution

Peer reviewers share a viewpoint that predominantly focuses on imparting training about the platform to the dedicated resources. They urge application leaders to allocate time to learning the capabilities in order to pave way for successful implementation.

One of the peers states:

Ensure that you have someone trained on the solution so that you can own your call flow design. This will help you become self-reliant and you would not be requiring any external help when making changes, adjustments, deployments, etc.

— Infrastructure and Operations Professional, Service Sector
Another peer recommends:

Focus on imparting the training on best practices (e.g., how to set up the correct number). Rationale supporting this suggestion is that it will make you spend less time in troubleshooting issues on your end.

— Technical Professional, Finance Sector

Peer recommendations include:

- Ensure that admins undergo the training to gain certification for providing the support to the implementation team. Focus on capturing training’s cost in the overall operating costs of the platform.

- Emphasize learning about different ways to integrate the solution with other tools. Furthermore, information related to integration can be captured in notes, transcriptions and audio recordings.

- Focus on acquiring an in-depth understanding of the solution from webinars and other training videos. Moreover, communities created by the vendor can prove to be beneficial because of the recommendations addressing different topics.

Recommended reading:

“7 Agent-Oriented Technologies That Optimize Customer Service Cost”

Lesson 4: Adopt a Proactive Approach While Planning the Implementation

Various peer reviewers emphasize planning the implementation in a diligent way. According to them, it enables the implementation team to circumvent bottlenecks and/or hiccups that may arise during the implementation phase.

A peer suggests:

It is highly recommended to make your team focus on changes and deployment in a proper way. Apart from that, you need to set aside the maintenance and deployment windows.

— Infrastructure and Operations Professional, Service Sector
Another peer recommends:

I suggest you to conduct careful planning of your implementation. We had some challenges but it was mostly our fault because we did not prepare and set the right expectations.

— Technical Professional, Unnamed Sector

Peer recommendations include:

- Audit the implementation strategy to understand the starting point in terms of services and licenses required. Ensure to set up the recording names for the IVR prompts in a comprehensible way.
- Consult with the vendor about the overall unified communications strategy.
- Ensure the presence of an internal failover IT solution in the event of a failure or abnormal termination of the platform.

Recommended reading:

“The Future of Contact Center”

“A Collaborative Approach to Customer Service Will Drive Higher Customer Satisfaction”

“Hype Cycle for Customer Service and Support Technologies, 2020”

Methodology

Of the Peer Insights survey data considered for this market, only those responses meeting the following criteria were included in this synthesis:

- Reviews less than 12 months old.
- Responses that pertain to the project experience and are not tied to the capabilities of a vendor.
- Reviews were clustered into the top-four most-referenced categories (lessons learned) and then listed in order of relevant phases in the project life cycle.
The results of this synthesis are representative of the respondent base and not necessarily the market as a whole.

**Recommended by the Author**

- Lead a Contact Center With a Proactive Approach to Cost Management
- Magic Quadrant for Contact Center as a Service, North America
- Critical Capabilities for Contact Center as a Service

**Recommended For You**

- サービスとしてのディザスタ・リカバリのマーケット・ガイド
- Market Guide for Intranet Packaged Solutions
- Defining the Digital Experience Platform
- The Agile Supply Chain Imperative: Empowering Agile and Self-Forming Teams
- Ask These Four Questions About Enterprise 5G

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