TREAT TECHNOLOGY PARTNERSHIPS LIKE A MARRIAGE!

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BY GERRY BARBER, CONTACT MANAGEMENT SOLUTIONS

n 1988 I wrote an industry article, titled "Life with Multiple Vendors", which appeared in the Service Level Newsletter, published by ICMI.

The message in that article underscored the value and importance of working together, as one team, to achieve operational success.

Today, choosing the right partner(s) to build and execute a customer experience (CX) strategy is mission-critical; the partnership(s) must be highly collaborative to succeed. They should not be taken lightly, like a holiday kiss under the mistletoe or after the famous ball had dropped in Times Square on New Year's Eve with someone you don't or barely know.

Successful partnerships take tremendous work, passion, determination, and effort. Just like a good marriage.

Finding the right partner(s) starts with creating a clear vision for the CX strategy. Successful partnerships also require a matching cultural fit, alignment of capabilities, flawless execution, and ongoing collaboration.

Start with a Clear Vision

Achieving a clear vision starts with identifying a CX strategy that is right for the business. After establishing the vision and business purpose, create the necessary roadmap, goals, and key requirements to assist in the search for suitable vendors. Make sure potential partners understand the nuances of your business and industry as well.

Next, consolidate this information into one Request for Information (RFI) document with the intent to provide it to potential vendors. Great partners respect clients that clearly articulate their vision and business requirements.

Marty Katz, Vice President, North America, Novelvox, a leading provider of next-gen contact center solutions, had this to say about vendor partnerships.

"A true customer-oriented vendor shares the client's goals and works to secure a complete understanding of their roadmap. The vendor should be part of the team to help augment and deliver on the vision. Achieving success is a shared responsibility."

Check for Cultural Fit

Successful partnerships require a like-kind cultural fit. Here's how to ensure it:

- Factor cultural fit into the partner selection process. Seek partners with values that align with your organizational culture and CX vision.
- Match values such as work ethic, sense of urgency, and passion.
- Evaluate potential vendors for culture fit by reviewing their websites, marketing materials, LinkedIn profiles, posts, podcasts, webinars, and yes published articles, and through initial conversations with the sales organizations.

Next, share the RFI with a few select vendor candidates. Then, based on the vendor's RFI responses, which should include client references, conduct reference interviews to glean cultural and operational insights. In addition, through networking, supplement the vendor

references by seeking vendor intelligence from additional sources.

Ensure Alignment of Capabilities

With a clear vision and a cultural fit attained, there should be no surprises! However, it takes straight talk between the parties to achieve a level of clarity that ensures the vendor capabilities are aligned to the vision.

Think of this as the courtship and engagement period. Alignment of the business requirements, expected deliverables, and implementation timing will ensure success.

Jay Elshaug, Senior Director, Professional Services, Genesys provides the following guidance. "(1) The roadmap needs to be aligned to budget and realistic timelines, (2) attain a collaborative approach to clear epics and user stories, placing trust to let the process unfold, and (3) have a shared commitment to change management through proper executive sponsorship and communications."

Ensure Partners Have the Ability to Execute Flawlessly

Avoid being left at the altar! With a clear vision, cultural fit, and deliverables aligned, the parties should be ready to consummate the marriage.

Achieving a smooth cutover is the culmination of months of working towards a well-written contract and project plan. They should provide assurances that all agreed-upon resources, connectivity, services, and related deliverables are in place and ready to launch.

Project management affects outcomes, so seek input into the selection of a project manager (PM). Choosing the right person for the PM role can be a difference-maker.

Keep in mind that no matter how well the parties plan, there will be unforeseen challenges. Thus, all partners should commit to being available around the clock during the cutover period to swiftly fine-tune or remediate loose ends.

Ensure Partners Provide for Ongoing Collaboration

Long-term relationships require post-implementation collaboration. Ongoing collaboration was something sorely missing back in 1988.

Today, top vendors know the importance of providing long-term collaborative support and education for their solution(s) that go well beyond an #800 number or self-service ticketing.

Technology partners now offer uniquely tailored support options to reap the most from your organization's technology investment. Offerings such as assigned technical managers, customer success liaisons, learning certifications, and application partner stores all provide ongoing collaboration to deliver long-term value.

Unfortunately, in marriage as well as in business partnerships, great partnerships are not made in heaven. Or necessarily under the mistletoe or on New Year's Eve.

Great partnerships start with identifying the right partner for the right reasons. All parties should be on the same page, passionate about the opportunity, and willing to work together collaboratively to make great things happen. ◉

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