Contact Center
Qualification Guide

> **IMPORTANT NOTE:** This document is meant to guide your discussion with customers and prospects and provide a way to capture important information. The discovery should happen as part of a natural conversation, not a Q&A session. If you need help, contact us to have one of our experts participate in a joint call.

Prospect Details

Company		**Phone**		**Status**	Current customer
Contact Name		**Email**			New prospect

Prospect Details

Question	Response(s)	Notes
What challenges is the customer/ prospect experiencing?	Reporting Lack of omnichannel On-prem today but need remote access Staffing (long queue wait times) Efficiency (long handling times) Other (please specify)	
What capabilities are on their wish list?		
Company size	# total employees: # contact center seats:	
What is the current situation?	Migrating from another system to Contact Center No current solution	
How do communications currently come in?	Voice only (toll-free 8XX, local) Chat SMS Email Example phone number:	
What type of PBX/phone system do they currently have?	Make: Model: Version:	

Question	Response(s)	Notes
Do they currently have a call center or contact center system?	No Yes If yes Make: Model: Version:	
How does Contact Center get positioned relative to your PBX?	Contact Center in front of PBX Contact Center behind PBX Contact Center is standalone	
Does the site have high-speed internet access?	No Yes If yes, what are the speeds? Up: Down: Min. bandwidth needed: [For reseller]	
Do they currently have an integrated CRM?	No Yes If yes, which one(s)? Please list any special CRM integration requirements:	
Please list any languages in addition to English that are required		
How would they like agents to connect to Contact Center?	Existing devices New devices Web UI	
Please list any special reporting requirements		

Timing and Budget

Question	Response(s)	Notes
What is the time frame to have the system up and running?		
What is the budget range for the solution?		
Are they considering other providers?	No Yes If yes, which one(s)? What are their main criteria for making a decision?:	

Additional Info

Question	Response(s)		Notes
Inbound opportunities			
What are the top questions/ procedures currently handled by the call center?		Est % Est % Est % Est % Est %	
What is the average number of communications per month?	Calls: SMS: Web chats:		
Additional details	Average call duration in minutes: Peak # of simultaneous calls by PBX system agents: Avg. compensation (cost/hr) per agent in the call center:		
Does this project have any special requirements	Speech recognition Voice analytics Other (please specify)		

Question	Response(s)		Notes
Outbound opportunities			
What are the top questions/ procedures currently handled by the call center?		Est %	
		Est %	
		Est %	
		Est %	
		Est %	
What is the average number of calls made with the current system?	Per month:		
What is the average call duration?	Minutes:		
What type(s) of dialing is preferred?	Preview Power Predictive Agentless		
What type(s) of messages will be delivered?	Recorded message Menu messages Database messages		
Is agent connection a requirement	Yes No		