

**CALABRIO™**

# Build Your Business Case

A HOW-TO GUIDE FOR CONTACT  
CENTER TRANSFORMATION



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### CUSTOMER EXPERIENCE (CX) TRANSFORMATION DEMANDS TRANSFORMATIONAL CHANGE IN THE CONTACT CENTER

The typical contact center looks much different than five years ago. More channels. More self-service. Remote and hybrid work models. Most importantly, more demands: Rising external expectations from customers demanding right-now service, hyper-personalized experiences, and seamless convenience. And rising internal expectations—from higher performance standards, to greater demand for data and insights from other business units, to the contact center's central role in driving CX transformation, and thus business success.

Yet the typical contact center tech stack remains largely the same as it was five years ago—even if analysts say the last few years saw unprecedented acceleration in digital technologies. Savvy contact center directors and CX leaders know that legacy tools and technologies just won't cut it.

Carefully evaluating the new generation of modern contact center solutions is just one part of the challenge. In fact, with clear leaders in the category, this might be the easy part.

The bigger obstacle is overcoming inertia. Contact center and CX leaders need to get the executive buy-in to make transformational investments in modern contact center solutions. And they need to build consensus with key stakeholders across the business, generating the momentum to drive implementation, adoption, and success.

This guide provides a framework that empowers champions for change to build an outcome-centric, evidence-based, and emotionally compelling business case to kickstart CX transformation in their organization.

#### THE BUSINESS CASE FRAMEWORK

DEFINE THE WHY



ILLUMINATE THE WHAT



SHOW THEM HOW



### FIGHTING THE STATUS QUO

Champions for change need to recognize their biggest adversary is the status quo. The easiest route in life is always to do nothing. Or it often seems that way at surface level.

In times without major turbulence, even a shining opportunity can be met with a cold, “Why?” People naturally gravitate toward what they know. This is true for end users that want to continue working with familiar tools (even as they recognize their shortcomings). It’s also true at the executive level, where even the most innovative leaders have to fight the urge to conservatively protect the status quo.

Even when facing major challenges or trying to achieve new goals, organizations tend to look within the realm of what they know today: How can we do more of what we’re already doing? Or alternatively, how can we get more while doing less of what we’re already doing?

### KEY INSIGHTS: FIGHTING THE STATUS QUO

#### CX Transformation Is Not Incremental

The growth in popularity of LEAN, Six Sigma, Kaizen, and other optimization frameworks put the focus on incremental revolutions. Small steps and quick wins that add up to significant impacts.

There's a time and place for optimization and efficiency. But true CX transformation demands more than incremental change. Organizations need to look outside of what they're doing today in order to achieve this level of change.

#### Winners Accelerate Through Downturns

Current economic anxieties only amplify the gravity of the status quo. Companies are slowing or halting tech investments amid recession worries. But a large body of research proves that companies that continue to make tech investments accelerate through downturns, surging ahead of competitors and capturing market share.



#### Bain & Company: The New Recession Playbook

"Our research has found that companies make more dramatic gains or losses during downturns than during stable periods."

"[Rising stars] play offense by selectively reinvesting for competitive outperformance."



#### Gartner: Recession Advice: Go on the Offense with IT Investments

A broad analysis of previous recessions showed that businesses that take calculated risks to drive innovation outperform those that take the conservative, cost-cutting path.



#### McKinsey & Company: Building Momentum in a Slowdown

An investigation of the 2008 Great Recession found that businesses that survived the economic downturn and came out ahead of their competitors shared common qualities:

- Willingness to invest in priority growth opportunities
- Continued investment in digital

## Build Your Business Case

### STEP 1: DEFINE THE WHY

The best way to combat the status quo: Go right at it. Craft a compelling and undeniable answer to the “why?” question—before it’s asked. This “why” typically falls into one of three categories:

#### EXISTING CHALLENGE

Define a challenge or friction point facing the business today.

##### Calabrio Customer Case Study

SaveOnSP’s contact center still used rudimentary Excel spreadsheets from the contact center’s first year of operations to manage service quality.

Leaders knew this legacy approach couldn’t give them the agility or insight needed to consistently uphold the commitments on which they base their business.

#### BUSINESS OBJECTIVE

Start from agreed-upon priorities or goals.

##### Calabrio Customer Case Study

Royal London wanted to transform its brand reputation by significantly improving customer and employee satisfaction levels. But to do that, they had to step up from manual reporting and siloed contact center technologies.

#### UNREALIZED OPPORTUNITY

Identify an opportunity that has not yet been considered.

##### Calabrio Customer Case Study

After Calabrio Speech Analytics identified that the calls AAA members made from highways maintained the lowest quality score of all calls and took substantially more time for agents to resolve, AAA leaders quickly set out to find out why and fix it.

#### OTHER COMMON EXAMPLES:

- Meeting higher customer expectations
- Addressing labor pressures (rising costs, decreased engagement, etc.)
- Enabling/optimizing remote or hybrid work models
- Rationalizing/optimizing the contact center tech stack
- Migrating to a true-cloud solution
- Gaining 360° customer journey visibility
- Harnessing voice-of-customer (VoC) insights
- Driving more profitability from the contact center

### TAILOR YOUR PITCH

#### Keep It At the Business Level

The initial impetus for change may stem from contact center operations or CX goals, but the “why” needs to directly connect with business outcomes.

Make your call center metrics make sense to the C-suite by tying them back to the priorities they care most about.

#### Tailor Your Pitch To the Persona

Have your short “elevator pitch” ready—tailored to whoever you’re talking to. Here are a few examples to get you started:

**CEO/COO:** We know we are competing on customer experience—and CX lives in the contact center. We need to invest in modernizing our contact center technology—not just to safeguard our brand, but to turn the contact center into a profit driver that powers sales and revenue, and generates the customer-centric business intelligence we need to make smart, strategic business decisions.

**CFO:** We know that getting more data-driven makes us more efficient from a bottom-line perspective. That’s why we need to invest in modernizing our contact center tech stack, so we can make sure we’re right-sizing resources to meet customer needs, using

data to drive smarter, more efficient service delivery, and putting the true cloud infrastructure in place that gives us cloud efficiencies today and a future-ready platform for tomorrow.

**CIO:** Our contact center is becoming the hub for customer-centric business intelligence. A tremendous amount of valuable information flows into and out of the contact center every day. We need to modernize and future-proof our contact center infrastructure, so we’ve got maximum control, security, and efficiency today—and a true cloud, future-ready platform for tomorrow.

**CMO/CXO:** We know that the voice of the customer lives within the contact center. We need to invest in turning the contact center into our customer-centric business intelligence engine—so we can harness the VoC in real time and get the insights we need to drive customer centricity across marketing, sales, and every facet of the CX.

**Contact Center Director:** We know we need to empower our agents to be guardians of our brand. But our contact center also has the chance to step into a modern role as a profit driver. We need to invest in modernizing our tech stack to do those things—so we can give agents the information they

need to deliver great CX, give managers the insights they need to drive contact center performance, and show business unit leaders the customer-centric insights they’re missing.

**Head of HR:** Our business is competing on the basis of customer experience—and we know that customer experience depends on employee experience. We need to invest in giving our contact center agents and managers tools that empower and engage them with the information they want and need to succeed and thrive.

#### Build a Foundation of Consensus

Pushback from business-unit leaders can derail things before you get executive buy-in. Conversely, building consensus across the business adds significant momentum to your executive business case. Whatever your “why”—challenge, goal, or opportunity—shop it around to other business units, and make sure you understand what matters most to each stakeholder.

- How is a given challenge impacting them?
- What obstacles are they seeing to achieving business objectives?
- What would an unrealized opportunity deliver for them?

## Build Your Business Case

### STEP 2: ILLUMINATE THE WHAT

The common instinct is to build a business case around the specific tech, tool, or solution: Here's what it can do, here's why it's better than what we have, etc. To executives—and even other business unit leaders—this typically ends up sounding like shop talk. It's too technical to be meaningful and inspiring.

What they want to know is simple:

WHAT'S THE VALUE?

WHAT'S THE COST?

WHAT'S THE ROI?



### TAILOR YOUR PITCH TO THE PERSONA

The value of a contact center solution can't be captured in a single KPI. Rather, champions need to stitch together a full picture of the value:



#### Connect Contact Center KPIs to Business-Level Outcomes

Proven contact center solutions should provide real-world case studies demonstrating the impact or value they deliver. Make sure you're connecting improvements in contact center performance to top-level business outcomes. For example:

- How does better EX translate into greater labor efficiency?
- What does improved agent training mean for revenue?
- What does better CX mean for customer retention?



#### Demonstrate Cyclical Value

Most contact center KPIs are closely connected: a boost in one drives second-order impacts on others. For example, enabling omnichannel visibility or activating VoC analytics insights will allow agents to deliver personalized experiences customers expect—boosting CSAT, NPS, loyalty and retention, etc. But empowering agents with this information will also drive better employee experience (EX): better engagement and lower attrition—outcomes that, on their own, correlate with improved CX.



#### Highlight Secondary Impacts Across the Business

First-order impacts not only drive secondary value within the contact center, but across the business. For example, using analytics and AI to understand customer engagement and predict customer lifetime value (LTV) can focus agents on the most valuable customers—but is also transformative for sales and marketing. Migrating to a true-cloud solution can free up IT resources and harden the enterprise security posture. And integrating customer-centric data streams is critical to giving agents 360° customer visibility, but it also enable the organization to build a customer-centric BI hub that holds potential across the enterprise.

## Build Your Business Case

### TELL THE TRUE-CLOUD VALUE STORY

Make sure you highlight how moving to a true cloud solution delivers powerful benefits to stakeholders throughout the enterprise:



#### Always Up-To-Date

Automatic software & security updates eliminate system maintenance time and free up IT time.



#### Scalability & Flexibility

Access to enterprise technology for businesses of any size. Scales to growing or fluctuating bandwidth demands to make organizations more agile and competitive.



#### Predictable Cash Flows

Subscription model is ideal for cash flow, delivering significant savings over on-premise.



#### Disaster Recovery

Enhanced business resiliency without the large up-front investment to build a backup and recovery system.



#### Reduce IT Burden

Enhanced business resiliency without the large up-front investment to build a backup and recovery system.



#### Security

Access to state-of-the-art security capabilities and automatic updates and patching to protect sensitive employee and customer data.

### UNDERSTAND THE TRUE COST

Simply showing the price tag for a new contact center software solution positions it as an incremental expense. That's a mistake. Champions for change need to tell the story of the life cycle of the investment.



#### Capture the Full TCO

The total cost of ownership (TCO) includes both the upfront costs for procurement and deployment, as well as the ongoing costs. But that cost breakdown needs to be put in the context of the TCO of the status quo. Make sure you're capturing all the costs associated with a legacy solution—things like hardware maintenance and security management for on-premise software, for example. And highlight comparative efficiencies of the new solution—labor efficiency/personnel reduction, reduced professional services costs, lower administrative costs, etc.



#### Project Costs on a 3-5-Year Horizon

Immediate costs of a new solution almost certainly outweigh operating costs of legacy software. Cost projections need to look across several years to capture the stable operating costs of the new solution. These operating costs will likely come in well below the status quo. It's critical to identify the intersection point: When will the TCO of the new solution drop below that of your legacy software? This drives home the high long-term costs of the status quo.



#### Subtract Estimated Cost Savings

Expected cost savings and operational efficiencies from a new solution will be part of the ROI calculation. But these cost savings should also factor into the cost comparison, as they directly reduce OpEx that currently is being allocated for a less efficient on-premise solution.

Here are some simple cost savings calculators to get you started.

### ON-PREMISE TCO ASSESSMENT TEMPLATE

The following is a template for assessing the full TCO of an on-premise solution over a three-year time horizon, with sample figures for a 500-seat contact center.

DESCRIPTION	YEAR 1	YEAR 2	YEAR 3	TOTAL
<b>EQUIPMENT COSTS</b>	\$250,000	\$175,000	\$150,000	\$575,000
<ul style="list-style-type: none"><li>• Hardware Costs</li><li>• Data Center Space</li><li>• Spares/Migrations</li><li>• IT Staff Support For Systems</li><li>• Energy/Utility Costs</li></ul>				
<b>SOFTWARE COSTS</b>	\$75,000	\$75,000	\$75,000	\$225,000
Multi-Vendor Maintenance Agreements				
<b>CONNECTIVITY COSTS</b>	\$7,800	\$7,800	\$7,800	\$23,400
<ul style="list-style-type: none"><li>• Maintenance &amp; Monitoring</li><li>• Remote Support</li><li>• Offsite Backups</li></ul>				
<b>OPERATIONAL COSTS</b>	\$14,000	\$14,000	\$14,000	\$42,000
Unplanned Repair Costs				
<b>DEPRECIATION</b>	\$65,000	\$55,000	\$55,000	\$175,000
<b>MAJOR UPGRADE</b>	-	-	\$100,000	\$100,000
<b>TOTAL COST OF OWNERSHIP</b>	\$411,800	\$326,800	\$401,800	\$1,140,400

### CALCULATE THE ROI

The ROI calculation for a contact center solution is complex. But once you've accurately identified the value—both in terms of contact center performance and business-level outcomes—and the TCO, you can confidently project the ROI of your CX transformation.



#### Highlight the Break-Even Point

Financial stakeholders want to know: When will the added efficiency and value from a new solution surpass the upfront costs? Make sure you clearly highlight and visualize this break-even point. And be realistic and transparent: Setting expectations is key to maintaining buy-in through implementation.



#### Emphasize Time-to-Value

While that break-even point may be months into the future, time-to-value is a very different metric. Contact centers typically begin seeing the value of a new solution within a few months—or even weeks. Identify the time-to-value for impacts like operational KPIs, employee experience, CX, revenue and profitability. Make sure business leaders understand that ROI is guaranteed in the long term—but value will come quickly.



#### Prepare the “Or Else” Story

A great way to put an exclamation point on the value and ROI story is to reverse-engineer it: Identify the risks and costs of maintaining the status quo. Whether the “why” is an existing challenge, business objective, or unrealized opportunity:

- What will costs look like if we do nothing?
- What value will we miss if we do nothing?
- Where will we forfeit competitive advantage by not innovating?



## PRESENT THE ROI YOUR STAKEHOLDERS CARE ABOUT

ROI looks different to each stakeholder. Make sure the ROI that you focus on includes KPIs that matter to the specific roles you are presenting to. For instance, here are KPIs that demonstrate the value of Calabrio ONE:

### CEO/COO

- 80% of Calabrio ONE customers say Calabrio WFM enables them to provide higher customer service with fewer agents, driving measurable annual savings.
- Calabrio ONE has a proven track record of increasing NPS and reducing customer effort by 40%.
- 70% of Calabrio ONE customers see at least a 5% increase in CSAT scores after deploying Calabrio ONE—some as high as 50%.

### CFO

- 80% of Calabrio ONE customers say Calabrio WFM enables them to provide higher customer service with fewer agents, driving measurable annual savings.
- Calabrio ONE has a proven track record of increasing revenue generated within the contact center.
- Most Calabrio ONE customers achieve ROI within 6-9 months.

### CIO

- Over 90% of Calabrio ONE customers say they're confident in the security of their Calabrio data.
- 80% of Calabrio ONE customers say they can use the partners they want and do not feel restricted to work with certain ACD/CCaaS platforms.
- Nearly 90% of Calabrio ONE customers say Calabrio is quicker to react to their needs than their previous tech vendor.

## PRESENT THE ROI YOUR STAKEHOLDERS CARE ABOUT (CONTINUED)

### CMO/CXO

- Calabrio ONE has a proven track record of increasing NPS and reducing customer effort by 40%.
- 70% of Calabrio ONE customers see at least a 5% increase in CSAT scores after deploying Calabrio ONE—some as high as 50%.
- More than 80% of Calabrio ONE customers say Calabrio Analytics has improved their understanding of customer behavior and agent experiences.

### CONTACT CENTER DIRECTOR

- Nearly 80% of Calabrio ONE customers say they can more easily plan a multi-skilled workforce for multichannel interactions with Calabrio WFM.
- 80% of Calabrio ONE customers say Calabrio WFM enables them to provide higher customer service with fewer agents, driving measurable annual savings.
- Nearly 70% of Calabrio ONE customers say Calabrio's predictive analytics makes their team's job easier and they gain value from 100% of customer interactions

### HEAD OF HR

- Majority of customers see a dramatic decrease in employee attrition with Calabrio ONE, including one that saw 85% reduction in attrition (from 14% down to 2%) in just two quarters.
- Over 70% of Calabrio ONE customers say it's easier to train new hires on Calabrio ONE than other solutions because of the design and in-product guidance.



### STEP 3: SHOW THEM HOW

One of the biggest obstacles champions of CX transformation must overcome is business leaders' general anxieties about the anecdotal horror stories of deployment debacles and failed tech transformations. Solutions that looked great on paper, but proved too challenging to execute. Situations where implementation dragged out for years—or stalled altogether—driving up costs and delaying value realization. Or scenarios where the organization was simply unable to fully leverage the solution because of adoption issues.

Here are four keys to showing them the clear, confident path to value realization:

1

SHOW THEM THE EASE OF  
TRUE-CLOUD DEPLOYMENT

2

DEFINE WHAT YOU NEED TO SUCCEED

3

GET USER BUY-IN EARLY

4

PAINT THE PICTURE OF CONTINUOUS  
VALUE REALIZATION

### SHOW THEM HOW

#### Show Them the Ease of True-Cloud Deployment

The common reason that transformational implementations fail is simple: Organizations don't have the resources ready to support. At the same time, executives are wary of the high costs and heavy internal burdens of deploying a new solution. Highlight how leading true-cloud solutions are purpose-built for efficient deployment with minimal internal burden:

- No hardware to deploy
- No software to manually install on devices or in your environment
- Lightweight ongoing administration (automatic updates, security management, etc.)

#### Define What You'll Need to Succeed

Cloud-based solutions are easier to deploy and manage than ever. But there's no such thing as a plug-and-play solution. Success requires the right internal resources, internal champions to lead the charge, and simple preparations to streamline the process. Your vendor should provide guidance on:

- What deployment, training, and ongoing management looks like
- What internal resources you'll need
- Best practices for success

#### Paint the Picture of Continuous Value Realization

In addition to illuminating the path to rapid value realization, champions of CX transformation also need to show how a new solution is set up—between the technology and the vendor support—to drive continuous improvement. In other words, how will you successfully leverage the solution on an ongoing basis to drive incremental improvement in key business outcomes?

Two key elements to this story are people and process: How does the vendor provide expertise to support your ongoing success? And how can the vendor leverage proven best practices to drive continuous improvement?

#### Get End-User Buy-In Early

Resistance to change can keep end users from fully embracing and adopting a new solution—and keep organizations from seeing the full value. Within the contact center, show users (agents, WFO and QM managers, etc.) how the new solution will simplify their jobs and empower them in important ways.

But to achieve CX transformation, you also need buy-in from users outside the contact center. Make sure users in other business units understand how they can leverage VOC analytics to drive customer-centric decision-making—or how they can use on-demand contact center reporting to get real-time visibility to how their initiatives are impacting CX-related outcomes.

### PUTTING IT ALL TOGETHER: TELL THE STORY OF VALUE REALIZATION

Building a business case for new technology feels like an enormous and amorphous challenge: Where do you start? How do you make sure you're covering all your bases? Walking through this simple template breaks the challenge into achievable objectives, helping you do your homework as you assemble all the proof you need to make a compelling case.

But it's important to remember that the business case is not just a matter of numbers. A single ROI calculation doesn't close the deal. Yes, people want hard data—but it's stories that connect with people and move them to action. The greatest utility of this business case template is helping you create a classic narrative arc around your contact center transformation.

#### Make Your Stakeholders the Heroes of Their Own Stories

Here's the final, crucial thing to remember: Everyone sees the world through the lens of their own priorities, responsibilities, and challenges. Whether you're building buy-in with agents and other frontline users, or making your case to the CEO, your business case should show the target audience how the new technology solution will make them the hero of their own story.

#### TENSION DEFINE THE WHY

Set up the rising tension around existing challenges and overlooked opportunities. Why make a change—and why now?

- Keep it at the business level
- Tailor your pitch to the persona
- Build consensus with business-unit leaders

#### HOPE ILLUMINATE THE WHAT

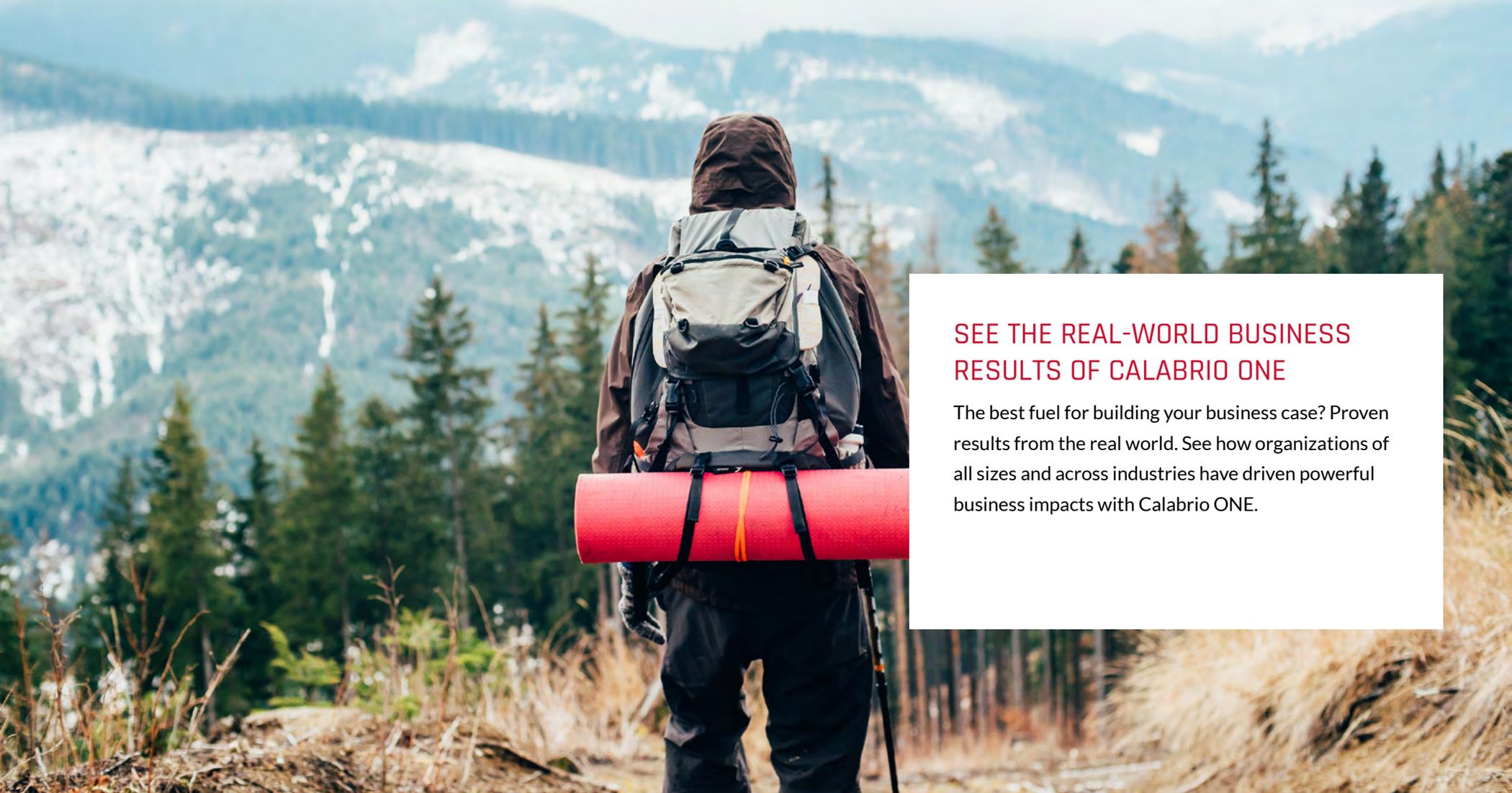
Introduce the solution. Make sure you lead with the emotional value proposition (how the solution will make a stakeholder feel), and back that up with the numbers.

- Show the value
- Understand the true cost
- Calculate the ROI

#### RESOLUTION SHOW THEM HOW

Directly address their concerns and anxieties, showing them that change doesn't have to be painful.

- Focus on ease of true-cloud
- Define needed resources
- Get end-user buy-in
- Show what success looks like



## SEE THE REAL-WORLD BUSINESS RESULTS OF CALABRIO ONE

The best fuel for building your business case? Proven results from the real world. See how organizations of all sizes and across industries have driven powerful business impacts with Calabrio ONE.

# CALABRIO™

FOR AGENTS | FOR BRANDS | FOR SUCCESS

Calabrio is a trusted ally to leading brands. The digital foundation of a customer-centric contact center, the Calabrio ONE workforce performance suite helps enrich and understand human interactions, empowering your contact center as a brand guardian. We maximize agent performance, exceed customer expectations, and boost workforce efficiency using connected data, AI-fueled analytics, automated workforce management, and personalized coaching. Only Calabrio ONE unites workforce optimization (WFO), agent engagement, and business intelligence solutions into a true-cloud, fully integrated suite that adapts to your business.

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