




The Essential Handbook

# Writing the Modern Customer Service RFP

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# Legacy is Out. Modern is In.

Your customers are changing fast. To stay on par with them and their rising expectations, companies need to leverage the advantages of today's modern technology.

Most of the customer service platforms companies use today were built in the 90s, which means they weren't designed to accommodate the way the present-day customer wants to communicate. Companies are realizing that they need a modern platform that's built for this century; one that considers the channels their customers are currently using, the ones they want to use, and how they want to be treated by the companies they buy from, whether they're long-term or first-time customers.

We understand that writing an RFP for a modern customer service platform isn't easy. That's why we took an in-depth look at countless RFPs, and pulled the five essential requirements that companies are leveraging to find the best modern-day platform for their business. And to help you write those requirements, we've included sample questions along the way for you to use in your own RFP. This essential handbook will help you find the platform that's best for you, your business, and your customers.

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## The 5 Essential Requirements of the Modern Customer Service Platform

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Nº1.

# A Customer-Centric Platform

Case ID. Ticket number. Order confirmation. In the world of customer service, it's easy to default to seeing customers as numbers. But with a modern, customer-centric platform, customers can once again be treated like the important people they are. **A modern platform can empower your team to focus on building long-lasting relationships and empathetic conversations based on their history with your company, instead of waiting for them to dig up their case number.** With the right platform, your agents will be able to deliver exceptional service that goes above and beyond, so your customers will feel known and cared for, and you can drive loyalty and long-term revenue for your business.

# A Platform Designed Around the Customer

## A Unified History of Interactions, Tied To Your Customer

A modern customer service platform should be centered around the customer and be able to identify them based on their unique identifiers (eg. their email address or phone number), tying them to a single customer profile. That way:

**Every interaction—regardless of channel—is collected into one single space**, specific to a customer, creating a complete timeline of their interactions with you

**Agents spend less time searching for and capturing information**, and digging through duplicate conversations

**Customers have a better experience** because they don't have to repeat and recap just because they switch channels or speak to a new agent

## Build Relationships That Last a Lifetime

Your platform should also make it easy for agents to build rapport and relationships through repeat, high-touch interactions.

To **maintain continuity for the customer**, customers should, as far as possible, be routed by default to the same agent who last helped them

To **help nurture high-value, VIP customers**, companies should be able to assign a dedicated concierge for a customer to be routed straight to

To **give agents the full picture**, agents should be able to link customers to people associated with them (eg. an assistant, spouse, or designer) easily

### SAMPLE RFP QUESTIONS

**Give your agents the full picture with these RFP questions.**

**Scenario** A customer reaches out on email, follows up with a phone call, then moves to chat. How does an agent see all the interactions across those various communication channels (i.e. how many systems/windows/tabs do they navigate)? Please provide a screenshot of your agent's view of multi-channel communications.

**Question** How does your platform handle an existing customer reaching out from an unidentified email address/number? How do they ensure these communications are consolidated with the customer's prior interactions, not siloed in a separate case/ticket?

### WORK SMARTER NOT HARDER—BORROW ME FOR YOUR NEXT RFP

**Help agents build long-lasting relationships with these questions.**

**Question** How does your system route customers by default? What configuration options are available?

**Question** How does your platform maintain continuity between a customer and the last agent they interacted with?

**Question** Does your platform allow for a dedicated relationship between a customer and designated agent/team, so any time they reach out, they're immediately directed to that agent/team? Please describe how your platform does this.

**Question** How does your platform associate a customer's relationships and connect conversations between them and someone reaching out on their behalf (eg. spouse or assistant)?

# A Single Comprehensive View of Your Customer

## Pull Customer Information Into One Place

Your customer information (eg. loyalty status, marketing emails, past transactions) often sits across multiple systems or platforms. This means agents waste precious time toggling between windows trying to find what they need. Your platform should:

**Pull key customer information from disparate systems**, along with their full conversation history, into a single view of the customer for agents

**Allow agents to click through from the customer's profile** to corresponding external systems if they need further details, or to trigger work

## Turn Your Contact Center Into a Revenue Center

An agent's responsibility shouldn't end at helping with a customer question or issue. Empower agents with key customer information like their purchase history or preferred products so they can make thoughtful, tailored recommendations that benefit both your customer and your bottom line. Your platform should:

**Pull previous transaction information about your customers** (eg. reservation status or last order shipped) as well as purchasing patterns or preferences for agents to leverage and make personalized recommendations

**Pull important information into your agent's view**, so they see the key data they need to create upsell opportunities (eg. lifetime value and return rate)

### SAMPLE RFP QUESTIONS

Keep your agents on the same page with these RFP questions.

**Question** How does your platform integrate with external CRM systems to pull contextual information about the customer in real time? Once pulled in, where does it live on your platform and how easily can agents access it? Please provide a screenshot of your agent's view of key customer information.

**Question** How does your platform integrate with third-party transaction systems to pull real-time contextual information about the customer to your agents (eg. reservation status, latest order shipped, preferred products/services)? Once pulled in, where does it live on your platform, and how easily can agents access it? How easy is it to pull in different types of data?

**Question** How does your platform support the creation of custom attributes/fields about a customer?

## The 5 Essential Requirements of the Modern Customer Service Platform

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Nº2.

# Moving Beyond the Channel

Your customers aren't thinking about the channel they use to contact you. They just want to use what's most convenient, and switch between channels without losing the context of their past interactions. **Just as the channel isn't the focus for your customer, it shouldn't be the focus for your platform either.**

Invest in a platform that's channel agnostic; that lets agents and customers switch between channels seamlessly based on what's convenient or appropriate for the information being communicated. Because at the end of the day, it's not the channel that should matter, but your customer.

# Single Platform = Seamless Experience

## A Single Platform, With All Channels Built In

Invest in a single platform that has all the channels you want to offer, rather than buying separate, ad-hoc solutions. Those channels should also be natively built in (i.e. built specifically for and into the platform), rather than disparate systems bolted onto a single interface, collected through various acquisitions or add-on applications cobbled together. It's important because:

**Separate, ad-hoc systems either don't connect** or are clunky to connect, limiting the interactions an agent sees if they took place on another system

**You avoid having to sign a big check, often up to 3x the licensing cost**, to integrate the stand-alone or 3rd party apps you'll need to support the "360 degree view" you've been promised during the sales process

## (Your) Voice Matters

Most legacy customer service platforms don't come with voice, which means companies have to purchase expensive platforms, or 3rd-party apps and add-ons. Find a platform with voice not only built into it, but tied tightly to your other digital channels, so agents can use any channel, and view a customer's full history across every channel. Finding a scalable, reliable voice solution built into the same platform as your other digital channels:

**Will save you significant dollars (we're talking in the millions)** since you don't have to pay to integrate and maintain a separate voice platform

**Drives greater efficiency since agents** can leverage interactions across all channels and switch channels midway (eg. move from a voice call to text)

### SAMPLE RFP QUESTIONS

**Make your platform the 'jack of all trades'—try these in your next RFP.**

**Scenario** Describe how the various channels work within your platform. Are all channels (including voice) built-in natively? If not, what plugins/apps/add-ons are required to support each channel? What is required to integrate voice into the core platform? What are the estimate ranges in cost and time it would take to implement?

**Scenario** Does your voice offering come built-in with an IVR, and does it include speech recognition capabilities? If so, please describe how it works. If not, how does it get added on?

# Focus on Channel Fluidity

## Flexibility to Meet Changing Needs

Sometimes a customer issue is best served using a channel different from the one they originally reached out to you on. For example, an agent might email a confirmation number while on the phone with a customer, or the customer might text a picture of a defective product while they're on chat. Your platform should:

**Enable both agents and customers to interact simultaneously across multiple channels** according to what is appropriate or convenient for the subject matter at hand

**Consolidate simultaneous interactions between an agent and a customer** within the customer's overall timeline of interactions, instead of creating a separate case/ticket

## Get Up and Running On New Channels

The channels you have today, may not be the same ones you need tomorrow. Your platform should be able to meet your changing needs by:

**Allowing you to add new channels** to your platform fast

**Maintaining a consistent look and feel across every channel**, so agents don't have to learn a new way of working when they switch from one channel to the next

**Being easy to use**, so agents—both regular and seasonal—can get up and going fast

### IMITATION IS THE SINCEREST FORM OF FLATTERY

**Help agents and customers float (like a butterfly) between channels with these RFP questions.**

**Question** Does your platform allow agents to work simultaneously across multiple channels (eg. being able to send an SMS while on the phone with a customer or vice versa)? Describe the agent experience and the interface used to manage this.

**Question** How does your platform handle simultaneous interactions from a customer over multiple channels (eg. a customer sending an image over MMS while talking to the agent over the phone). Describe the agent experience and the interface used to manage this.

### GO AHEAD AND COPY ME—I WON'T TELL

**Get your contact center running at full speed with these questions.**

**Question** On average, how long does it take to turn new channels on in your platform?

**Question** Describe the process of training agents and supervisors on your platform. Is there a need to train someone specifically to maintain the system?

**Question** How much time, on average, does it take to train a single agent on your platform. And how much time does it take to train on each additional channel as they get added / introduced?



## The 5 Essential Requirements of the Modern Customer Service Platform

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Nº3.

# Maximizing Operational Productivity

In a busy contact center, every second saved represents real dollar savings; savings that can go back into supporting your agents and delivering amazing experiences for your customers. **Your customer service platform should empower your agents to work smarter, not harder, with tools that help make them more efficient.** That means things like automation for manual tasks, an easy-to-access knowledge base, powerful collaboration features, search as lightning fast as Google, and a UI that's intuitive and inspired by modern consumer apps (just to name a few). Because at the end of the day, it's not the channel that should matter, but your customer.

# Help Agents Work Faster

## Not Your Grandmother's Knowledge Base

Your knowledge base should be more than a depository for template answers. It should empower agents to work faster and with confidence, so your customers receive a consistently high level of service. Your platform's knowledge base should:

**Leverage AI to suggest answers to agents** based on how similar questions were answered in the past

**Allow you to create and store channel-specific answers** (eg. longer answers for email, shorter versions for SMS), **and be able to identify and serve up the appropriate**, channel-specific answer to an agent

**Be built right into the platform, accessible from the same window** that agents respond to customers on, so they don't waste time toggling between windows and trying to help customers at the same time

**Have powerful, built-in search capabilities**, to help agents find answers faster

## Collaborate Easily Within and Outside Your Organization

Sometimes solving a customer's issue is a two or even three-man job. Your platform should make it easy for agents to collaborate with people both within the company and outside it by:

**Making it easy for agents to delegate work** both within and outside the organization, and to manage that work easily with deadlines and reminders

**Tying every interaction about a customer back to their profile**—regardless of whether the customer is directly involved in it—so their profile remains the most complete, up-to-date picture of their needs

### SAMPLE RFP QUESTIONS

**Expand your agents' minds with these RFP questions.**

**Question** Does your platform have a multi-channel knowledge base of template answers that agents can access? Is that knowledge base built into your platform, or does it require an additional system, plugins, apps, or add-ons?

**Question** Describe the agent experience when accessing the knowledge base. Do they have to navigate away from the screen they're currently responding to the customer on?

**Question** Does your knowledge base automatically suggest answers that your agents can use to respond to a customer? If so, please describe how your platform decides which answers to surface.

**Question** Does your knowledge base offer agents channel-specific answers based on the channel the agent and customer are on? If so, please describe how your platform decides which answer to surface.

### HOT OFF THE PRESSES—ROLL THESE INTO YOUR RFP

**Team work makes the dream work. Ask these questions in your next RFP for a more cohesive team workflow.**

**Scenario** A customer has an issue which requires help from multiple people, some within the organization and some outside of it. Describe: (i) how the agent goes about liaising with and delegating work to each of these groups of people, (ii) how the agent can keep track of the work that needs to be done, by when and by whom, and (iii) where these interactions (i.e. that are about the customer, but which do not involve them directly) are stored.

# Work Smarter, Not Harder

## Automation FTW

Play to your agents' strengths by investing in a platform that automates the manual tasks in your contact center. It saves you thousands of all-important man-hours you can put to better use, and means your agents can focus on delivering the high level of service that keeps customers loyal. Invest in a platform that can:

**Automatically route customers to the appropriate agent or team** based on the predetermined criteria set by you

**Take the guesswork out of an agent's day** by automatically routing them the next most urgent customer in their queue

## Upgrade Your Search From AltaVista to Google

Your agents spend a considerable amount of time searching through your platform, whether it's for the perfect answer or important customer information. But legacy platforms weren't built with search in mind, which results in a slow, unwieldy search experience that doesn't offer reliable, accurate results. Upgrade your agents from AltaVista to Google by selecting a platform:

**With a robust search engine that lets agents search for information** throughout the breadth of channels you provide

**That indexes customer information and conversations in real time**, so agents have the most up-to-date results at their disposal

### SAMPLE RFP QUESTIONS

**Save your agents from busywork with these questions.**

**Question** How are customers routed in your platform? How does it consider SLAs to prioritize and direct urgent work to agents?

**Question** How does your platform help agents decide which customer from their queue to help first?

### USE THESE TO FIND THE PERFECT PLATFORM

**Help agents find that needle in the haystack with these questions.**

**Question** Describe how your platform stores and indexes customer records (including speed of recall and frequency of storage).

**Question** Describe the agent experience when searching for information or customers in the platform. What parameters can they search for across customers, their contact information, their conversations, and additional attributes?

## The 5 Essential Requirements of the Modern Customer Service Platform

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Nº4.

# Real-Time Analytics and Reporting

Your customers aren't willing to wait days for answers anymore. With the rise of on-demand services like Lyft and Amazon Prime, customers expect instant gratification for their needs, whether it's for the products or services they want to purchase, or the information they need. **To keep up with these rising expectations, your customer service platform should give you a real-time view of what's happening in your contact center**, so you have all the information you need to pivot when you need to, based on your customer's current needs and the agents that are helping them.

# A Bird's Eye View of Your Contact Center

## See How Your Contact Center is Performing

Your contact center is dynamic and always changing. Invest in a platform that gives you the data you need to make decisions on staffing, work allocation, and training. Your platform should:

**Provide a real-time view of how your contact center is performing** across all channels and their Service Level Agreements, and include important metrics like volume of incoming customers and average wait time

**Offer a quick, snapshot view of your most important contact center metrics**, without needing you to toggle between multiple tabs and windows

**Be interactive, letting you click straight through from a particular metric** to the interaction itself (eg. an email left unanswered for some time)

**Provide a real-time view of your agent activity** as well as key agent metrics such as total agent idle time, utilized time, and overall productivity metrics

**Enable you to surface dashboards to everyone on your team**—from supervisors to agents—so everyone knows where they stand

## See What Your Customers Are Talking About

Your platform should give you a high-level view of what's trending across your contact center, so you can act quickly to get to the root of the issue. Invest in a platform that provides you with:

**A real-time, snapshot view of topics trending** across your contact center, across all channels

**An interactive interface that lets you dig in deeper** and get more specific details into the data that's being populated (eg. "Shopping Cart Issues")

### SAMPLE RFP QUESTIONS

**Keep your finger on the pulse of your contact center.**

**Question** Does your platform provide real-time metrics of your contact center's performance across all the channels offered? Does it require refreshing the page to see the latest? Is it all contained on one screen, or does it involve navigating between multiple tabs. Please provide a screenshot of what the view looks like.

**Question** Can users be taken to the interaction or conversation referred to in a specific metric? If so, please describe the user experience and types of metrics this applies to.

**Question** Can your platform provide a real-time view into an agent's status? If so, please provide a screenshot of this view.

**Question** Can your platform aggregate metrics across all channels into a single view?

### YOU COMPLETE ME MY RFP DOC

**Put your ear to the ground with these RFP questions.**

**Question** Does your platform display the current trending topics and issues in your contact center? If yes, please provide screenshots of the user view.

**Question** Can supervisors deep dive into the interaction or conversation referred to in a specific metric (eg. all interactions relating to "Shopping Cart Issues")? Can supervisors export reports easily and send them to other teams, or run further analysis on the data?

## The 5 Essential Requirements of the Modern Customer Service Platform

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**Nº5.**

# Implementation and Total Cost of Ownership

**Implementing your customer service platform shouldn't have to be a pain or cost you an arm and a leg.** Find yourself a trusted platform provider with a clear, considered plan in place. A provider that's skilled and committed to being a partner to your implementation from the first day of set up and beyond. And, when it comes to the cost of your platform, make sure you're not paying for more than you actually use. Because at the end of the day, it's not the channel that should matter, but your customer.

# A Partner Through Setup and Beyond

## Someone You Can Rely On

Implementing a customer service platform requires far more than just plug-and-play. To ensure that your platform is set up to promote both your current and future needs, look for a platform provider that:

**Has a bespoke implementation plan just for you**, taking into consideration key factors like the types of channels you want to offer, how your teams are structured, and how work is managed in your contact center

**Doesn't rely on third parties** to carry out the implementation for them

**Has a strong record of providing great support**, both at set up and afterwards, with a clear vision of how to take your contact center from where you are to where you want to be

## Don't Pay For More Than You Use

Your staffing needs can fluctuate significantly throughout the year. The additional staff you need over the holidays, for example, aren't typically necessary for the rest of the year. Make sure the platform you purchase:

**Is priced flexibly, to help accommodate peak or seasonal staff** (eg. not charging short-term user fees for seasonal staff)

**Only charges you for the employees who use the platform** to help customers directly

### SAMPLE RFP QUESTIONS

#### Find a provider you can trust fall with.

**Question** Describe the initial configuration and implementation process for your platform. Is there a need for, or do customers typically rely on, third-party implementation partners to help with setup?

**Question** How long does it typically take to configure and set up the platform?

**Question** What kind of support can we expect to receive from you after the initial implementation and setup? Do you provide ongoing training for agents?

### CTRL-C, CTRL-V

#### Pay only for what makes cents.

**Question** Can all employees in an organization access the platform? Is there a cost for employees who only need to view customer interactions and history?

**Question** Describe how your platform is priced for seasonal or peak period agents.

**Question** What percentage of the total costs is typically implementation vs. software license? What is the range of implementation pricing and timelines/high and low?



# CHECKLIST

## To the 5 Essential Requirements of the Modern Customer Service Platform

### Nº1.

#### A Customer-Centric Platform

- Identify customers based on unique identifiers
- Channel all interactions into a single profile
- Maintain continuity between agent and customer
- Pull key customer information into a single view for agents

### Nº4.

#### Maximizing Operational Productivity

- Built-in multi-channel knowledge base
- Knowledge base with machine learning
- Create and suggest channel-specific answers
- Easy collaboration within and outside your organization
- Automate manual tasks
- Powerful, built-in search

### Nº2.

#### Moving Beyond the Channel

- Single platform with all channels natively built in
- Reliable, scalable voice platform tied tightly to other digital channels
- Allow simultaneous conversations across multiple channels.
- Consolidate history into one profile
- Fast ramp up on new channels with intuitive platform and interface

### Nº5.

#### Implementation and TCO

- Provider with strong record of partnership and bespoke implementation plan
- No third-party implementation required
- Pay only for what you use
- No short term fees for seasonal staff

### Nº3.

#### Real-Time Analytics and Reporting

- Real-time contact center metrics across channels
- Interactive, snapshot view of metrics on a single screen
- Real-time view of agent activity and status
- Real-time view of trending topics in contact center

**Check the boxes on a call center that lives up to modern customer expectations**

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# The 90's Called— They Want Their Contact Center Back

We've come a long way from the contact center of the 90's when the main lines of communication with a company were phone or email. With new channels ever on the horizon, today's contact center faces the twin challenges of keeping up with the forward march of technology and rising customer expectations.

## How Gladly Can Help

Your customers want a seamless transition between the various channels they use to communicate with you. And they want you to remember who they are, what they prefer, and for you to tailor their experience accordingly.

But legacy platforms that focus on single channels, or which manage customer issues according to case or ticket numbers, aren't sufficient to provide the level of service that customers today are looking for.


**At Gladly, we wanted to reinvent customer service to facilitate that human connection.** Instead of routing 'tickets' and 'cases' we route people, and with them, their entire history of conversations and interactions. It means agents see a complete view of the customer and can use that to provide the seamless, omnichannel experience that customers desire.

We hope this Guide will be helpful as you choose your new customer service platform. If you have questions or want to learn more about Gladly, please reach out at [david@gladly.com](mailto:david@gladly.com)—we'd love to continue the conversation.

## Ready to work on your RFP? Get our full RFP Template Toolkit

We've done the legwork for you with our customizable, editable RFP spreadsheet with all the questions you need to evaluate the modern, customer service platform of today.

GET THE FULL RFP TEMPLATE

Brought to you by your friends at  **Gladly**