

Contact center checklist

Choosing or renewing contact center software is mostly about how your team works today. These answers keep the comparison grounded in that.

01 About how many agents and supervisors handle customer calls, chats or emails, and are any remote?

Include peak or seasonal staffing if it changes.

02 Which channels do customers use to reach you?

Phone, email, web chat, text, social media or self-service.

03 What platform runs it today, and does it connect to your CRM?

For example Salesforce, HubSpot, Zendesk or Dynamics.

04 Which numbers do you rely on?

Wait times, call volume, abandoned calls, customer satisfaction or quality scores.

05 Are you looking at AI or recording features?

Call recording, call summaries, a chatbot, self-service or speech analytics.

06 When does your contract renew, and what is the biggest pain point today?

Cost, reliability, reporting, agent experience or customer complaints.

Rough answers are fine, and "not sure" is a useful answer. Please don't send account numbers, passwords or full bills; if we need to look at a contract, we'll arrange a safe way to share it.