



OMNICHANNEL CRM CHECKLIST

**IS YOUR CRM PROVIDER
READY TO MEET YOUR
OMNICHANNEL DEMANDS?**

THE QUESTIONS YOU SHOULD ASK BEFORE COMMITTING TO A CRM SOLUTION.

✓ FLEXIBLE & AGILE:

Is there flexibility in the CRM platform to tailor the solution to my agent's needs?

Why this matters:

The right solution should be customizable for your business so agents have a full, 360-degree view of the customer without having to switch between screens or environments. This includes account validation, channel interaction, contact history or potential cross-sell/up-sell opportunities.

✓ CROSS-CHANNEL SUPPORT:

Can the CRM solution support your customers where they want to be in the moment?

Why this matters:

A conversation that starts via SMS or chat may require human escalation. A true, omnichannel CRM can seamlessly transition a customer from non-voice to voice without having to navigate across applications, creating a frictionless experience for both the customer and the agent.

✓ SECURITY:

Does the platform follow data center security best practices, authentication and sharing policies? What about compliance certifications and regulations relevant to your industry?

Why this matters:

Security and performance go hand-in-hand. The right CRM solution needs to support thousands of customers while protecting some of their most personal information and adhering to hundreds of regulations, e.g., Dodd-Frank, ADA, CFPB, TCPA, Reg GG.

✓ SUPPORT:

What level of engagement and partnership in design should I expect from the team as we build and develop the flexible, cross-channel, secure solution?

Why this matters:

Customer service is the key touchpoint between your brand and your customer. The right support starts with an experienced team that understands implementation nuances, best practices and is fully aligned with your CX needs to deliver better customer experiences.

✓ THE HUMAN FACTOR:

Do you have the right training program and contact center culture to support an omnichannel CRM platform with seamless interactions your customers expect?

Why this matters:

The right platform begins and ends with complete visibility into the customer's history and cross-channel interactions. Agents require training and skillset to deliver a differentiated customer experience on the channels your customers are on.

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