



# How to Buy Contact Center Software: Step 2 – Researching Software

After determining that your current technology isn't meeting your team's needs and identifying the business objectives new software must support, it's time to dive into the next phase: researching your options. With so many platforms claiming to optimize operations and deliver breakthrough customer experiences, it's easy to get overwhelmed. This step will help you navigate the landscape with a focused, strategic approach that ensures your research yields practical, actionable results.

 **by C Munoz**



# Begin with Trusted Resources

Your research should begin with sources you trust. Avoid diving headfirst into glossy vendor websites. Instead, build your understanding from credible, third-party sources:

## Peer Communities & Professional Forums

Engage with contact center professionals through platforms like ICMI, Call Centre Helper, or relevant LinkedIn groups. Real-world feedback from practitioners often surfaces insights that polished case studies and marketing brochures may omit.

## Industry Analysts

Use reports from organizations like Gartner, Forrester, and DMG Consulting to understand high-level trends and where specific vendors stand. These can provide direction but should not be used in isolation.

## Webinars, Events, and User Conferences

Industry webinars and events, whether vendor-hosted or independent, are excellent opportunities to see software in action, ask questions, and gauge how vendors respond to detailed use cases.



# Align Features with Real Challenges

It's easy to be dazzled by bells and whistles, but the real question is: can the software address the specific problems and opportunities identified in Step 1?

Create a checklist that categorizes features as:

- **Must-Haves** (e.g., integration with existing CRM, accurate forecasting engine, omnichannel support)
- **Nice-to-Haves** (e.g., mobile supervisor apps, embedded coaching workflows)
- **Deal-Breakers** (e.g., inability to scale beyond a certain number of agents, no local data residency options)



## Some critical areas to review:



### Usability & Training

Can your team adopt it without heavy onboarding or weeks of training?



### Integration & Compatibility

Will it fit within your current ecosystem without costly workarounds?



### Scalability

Does it support your growth trajectory across regions, lines of business, or channels?



### Data & Analytics

Does it provide real-time, actionable data that improves decision-making?



# Include a Range of Stakeholder Perspectives

Your research is only as strong as the perspectives you gather. Even if you're leading the evaluation, this is the time to pull in:



## Take a Strategic Approach to Vendor Content

Once you have a working list of platforms that meet your criteria, interact with vendors to get below the surface:

- **Request Use Case-Specific Demos:** Avoid canned presentations. Ask vendors to tailor demos to your top 2–3 workflows or known issues.
- **Download Thought Leadership & Case Studies:** Evaluate the maturity of each vendor's thinking. Are they innovating in ways that matter to you?
- **Ask for Peer Connections:** Most vendors will offer references, but it's smart to also seek peer introductions via your own network or public user groups.



# Avoid the Common Pitfalls



## Pitfall 1: Researching Without a Strategy

Don't just collect product sheets. Document your research, track your impressions, and compare apples to apples using a consistent framework.



## Pitfall 2: Mistaking Price for Value

Low pricing can be tempting, but it's often a signal to dig deeper into what's missing. A higher upfront cost might include more robust support, faster implementation, or features that prevent future headaches.



## Pitfall 3: Ignoring the Vendor's Roadmap

Even if the product works for you today, you'll want to partner with a vendor who has a vision for tomorrow. Make sure their roadmap aligns with your needs.



# Conclusion

Researching software is more than gathering information—it's about building clarity and consensus around what will best serve your contact center today and tomorrow. Prioritize credible sources, involve the right stakeholders, and stay grounded in your real business needs.

With well-structured research in hand, you'll be ready to enter the vendor evaluation phase with confidence and purpose. In the next blog, we'll dive into how to assess vendors with structured comparisons, custom demos, and meaningful ROI analysis. Stay tuned!



## Gather Trusted Information

Start with credible third-party sources

## Include All Stakeholders

Ensure diverse perspectives inform your research

## Align with Business Needs

Focus on features that solve your specific challenges

## Evaluate Strategically

Move forward with confidence to vendor evaluation



# Up next: Step 3 – Evaluating Vendors

We'll explore how to effectively identify, compare, and evaluate contact solutions providers that align with your team's needs and organizational goals.

[Subscribe for Updates](#)

[Download Research Checklist](#)