

DOWNLOADABLE WORKSHEET · UNIFIED COMMUNICATIONS

# CCaaS Evaluation Scorecard & Requirements *Worksheet*

A working document, not a brochure. Fill it in before you sit through a single vendor demo, then carry it into every call so the evaluation is driven by your business – not by whoever gives the slickest pitch.

## How to use this worksheet

Print it, share it with whoever owns the budget, and keep one copy per vendor so the comparison stays apples-to-apples. Work through it in order:

1. Qualify – confirm you actually need CCaaS and not UCaaS with a call queue (6 yes/no questions).
2. Intake – write down your real requirements: channels, volume, concurrency, agents, regulated data.
3. Score – rate each vendor 1–5 across seven weighted criteria and let the math, not the demo glow, pick the finalist.
4. Verify – run the capability checklists, the compliance gate, the TCO model, and the reference-check questions against every shortlisted vendor.
5. Decide – record a final recommendation you can defend to finance.

## Step 1 – UCaaS vs CCaaS qualifier

Each Yes pushes you toward CCaaS. A wall of No means a UCaaS call queue is the honest, cheaper answer.

#	Question	Yes	No
1	Do you have a dedicated team whose primary job is handling customer interactions?	<input type="checkbox"/>	<input type="checkbox"/>
2	Is the team measured on CX metrics (AHT, FCR, service level, CSAT)?	<input type="checkbox"/>	<input type="checkbox"/>
3	Do customers reach you across more than one channel that must be unified?	<input type="checkbox"/>	<input type="checkbox"/>
4	Do you need routing by skill, language, priority, or customer value?	<input type="checkbox"/>	<input type="checkbox"/>
5	Do you need to forecast volume and schedule staff against it?	<input type="checkbox"/>	<input type="checkbox"/>
6	Do supervisors need real-time queue visibility, whisper/charge, and historical reporting?	<input type="checkbox"/>	<input type="checkbox"/>

Tally: Yes  / 6

Tally: No  / 6

### Read-out

- 0–2 Yes → A UCaaS call queue almost certainly wins. Stop here and evaluate UCaaS instead.
- 3–4 Yes → Borderline. Re-check volume and metrics; you may be growing into CCaaS.
- 5–6 Yes → You run a contact center. Proceed with the full CCaaS evaluation below.

## Step 2 – Requirements intake

Keep this to one page. It is the fixed yardstick you measure every vendor against.

### Channels (today vs. 18-month need)

Channel	In use today?	Needed within 18 mo?	Notes
Voice	<input type="checkbox"/>	<input type="checkbox"/>	
Web chat	<input type="checkbox"/>	<input type="checkbox"/>	
Email	<input type="checkbox"/>	<input type="checkbox"/>	
SMS	<input type="checkbox"/>	<input type="checkbox"/>	
Social / messaging	<input type="checkbox"/>	<input type="checkbox"/>	
In-app / other	<input type="checkbox"/>	<input type="checkbox"/>	

### Volume & concurrency

Metric	Value
Peak interactions per hour (voice)	-----
Peak interactions per hour (digital)	-----
Peak concurrent interactions	-----
Average handle time today (if known)	-----

### Staffing

Metric	Value
Total agents	-----
Peak concurrent agents	-----
Supervisors	-----
Sites / time zones	-----

### Routing logic (write the actual rules in plain language)

- By skill / queue: -----
- By language: -----
- By customer tier / account value: -----
- By prior agent / relationship: -----
- By SLA breach risk / priority: -----

### Regulated data (this answer reshapes the whole compliance section)

- Agents take card payments on calls
- Agents handle PHI (healthcare)
- Agents handle other regulated / sensitive data: -----
- No regulated data is handled

### Step 3 – Weighted scoring grid

Adjust the weights to match your intake (e.g., if you take payments, raise Compliance and lower TCO). Weights must total 100%. Score each vendor 1-5 per criterion, then multiply by the weight for a weighted score. Sum the weighted scores per vendor.

Criterion	Weight %	Vendor A (1-5)	Vendor B (1-5)	Vendor C (1-5)
Routing & IVR intelligence	20	---	---	---
Workforce management	15	---	---	---
Integration depth	20	---	---	---
Agent & supervisor experience	15	---	---	---
Analytics & CX metrics	15	---	---	---
Compliance & security	10	---	---	---
Total cost of ownership	5	---	---	---
Weighted total ( $\Sigma$ score $\times$ weight)	100	-----	-----	-----

Scoring tip: A “5” means it does this exceptionally and proved it in your demo with your data. A “3” means adequate. A “1-2” on Routing, Integration, or Compliance should make you nervous regardless of the total.

## Step 4 – Capability checklists

Mark each item Y / N / Partial per shortlisted vendor.

### Routing checklist

- True skills-based routing (not glorified hunt groups)
- Omnichannel routing (chat and voice share the same logic)
- Priority / SLA-aware queuing
- Routing on CRM-pulled customer context
- Last-agent / relationship routing
- Overflow and failover routing rules
- You tested your routing rules live in the demo

### IVR / self-service containment checklist

- Visual / configurable IVR flow builder (no vendor ticket required for changes)
- Conversational / natural-language self-service
- Measured containment rate (% resolved without an agent)
- Self-service can read/write to systems of record (e.g., order status, payments)

- Clean escalation to agent with context preserved
- Callback / virtual queue option

### Workforce management (WFM) checklist

- Volume forecasting
- Staff scheduling against forecast
- Adherence tracking (agents available when scheduled)
- Intraday re-forecasting when reality diverges from plan
- Native (not a bolt-on) – confirm: \_\_\_\_\_
- Shrinkage and occupancy reporting

### Integration-depth checklist

- Screen pop on inbound interaction
- Click-to-dial from the CRM
- Bi-directional data sync (interactions logged automatically)
- Embedded agent experience inside the CRM
- Verified against our specific CRM: \_\_\_\_\_
- Open API / webhooks for custom integration

### Compliance & security checklist

- PCI scope reduction via DTMF masking / pause-and-resume recording
- Automatic redaction of sensitive data from audio and transcripts
- Recording retention controls + access logging
- Encryption of recordings at rest and in transit
- Data residency guarantee in writing (region: \_\_\_\_\_)
- SOC 2 Type II attestation available
- Industry frameworks as needed (HIPAA BAA, etc.): \_\_\_\_\_

### Analytics / CX metrics checklist

- CSAT capture and reporting
- AHT (average handle time) at agent / queue / channel level
- FCR (first-contact resolution) reporting
- Service level, abandonment, and occupancy reporting

- Real-time supervisor dashboards
- Speech / interaction analytics across 100% of interactions (not just QA sample)
- Custom report builder + scheduled exports

## Step 5 – TCO worksheet

Two vendors with the same per-seat sticker price can differ by 40%+ once real usage lands. Model the all-in cost against your actual volume and concurrency, not the headline number.

Cost component	Vendor A	Vendor B	Vendor C	Notes
Licensing model (per-named-seat vs per-concurrent)	-----	-----	-----	Concurrency often wins for shift-based teams
Base platform fee (annual)	-----	-----	-----	
Telephony / usage (inbound + outbound minutes)	-----	-----	-----	Often billed separately
Premium-channel fees (SMS, social, messaging)	-----	-----	-----	
AI / analytics add-ons (per interaction?)	-----	-----	-----	
WFM module (if not native)	-----	-----	-----	
Overage charges (above committed volume)	-----	-----	-----	Model your peak month
Implementation / professional services (one-time)	-----	-----	-----	
Estimated 3-year all-in TCO	-----	-----	-----	

## Step 6 – Reference-check question bank

Ask every shortlisted vendor for two references that resemble your size, industry, and channel mix. Then ask the references:

1. How long did implementation actually take versus what was quoted?
2. What did integration with your CRM really look like – screen pop, or fully embedded?
3. Which capability did you expect to use that turned out weaker than the demo suggested?
4. How accurate has the forecasting / WFM been against real volume?
5. What did your first invoice include that you didn't expect?
6. How responsive is support when a routing or recording issue hits production?
7. If you take payments, how did the platform handle PCI scope during your audit?
8. Knowing what you know now, would you choose this platform again – and what would you do differently?

## Step 7 – Final recommendation summary

Field	Entry
Recommended vendor	-----
Weighted score	-----
3-year TCO	-----
Strongest reason to choose	-----
Biggest known risk / gap	-----
Conditions before signing	-----
Decision owner & date	-----

One-paragraph rationale (write it so finance can read it cold):

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*Worksheet companion to “CCaaS or UCaaS? How to Tell Which One You Actually Need.” Prepared by Plow Networks – Unified Communications.*

### Standing Up or Replacing a Contact Center?

Plow helps IT leaders compare CCaaS, UCaaS, and contact-center platforms against real requirements – not vendor demos.

[Talk to Plow’s Unified Communications Team →](#)