Technical Integration Assessment Kit

Purpose: This diagnostic tool helps you rapidly assess technical compatibility, identify integration requirements, and validate security/compliance readiness before committing to a call analytics vendor pilot.

Part 1: Pre-Assessment Checklist

Before you begin, gather the following information from your organization:

Current Tech Stack

- Contact center platform (Five9, Genesys, Amazon Connect, Talkdesk, etc.)
- CRM system name and version (Salesforce, HubSpot, Zendesk, etc.)
- Single Sign-On (SSO) provider
- Data warehouse/analytics platform
- Call recording system (if separate)
- Quality management/WFM tools
- API documentation access

Key Stakeholders to Involve

- IT/Engineering lead (for API assessment)
- InfoSec/Compliance officer (for data governance & call recording regulations)
- Contact center operations manager
- CRM administrator (for integration scoping)
- Data/Analytics lead (for reporting requirements)
- Legal/Compliance (for call recording consent & retention policies)

Decision Timeline

- Target pilot start date: _____
- Budget approval deadline: _____
- Number of pilot agents: _____
- Call volume (daily/monthly): _____

Part 2: Technical Integration Diagnostic

Section A: Authentication & Access Control

Current State Assessment

1. What SSO protocol does your organization use?
   ○ SAML 2.0
   ○ OAuth 2.0
   ○ OpenID Connect
   ○ Active Directory/LDAP
   ○ Other: _____
   ○ No SSO currently
2. User provisioning requirements:
   ○ Automatic user creation from SSO
   ○ Just-in-time (JIT) provisioning needed
   ○ Manual user imports acceptable for pilot
   ○ SCIM protocol support required
   ○ Integration with HRIS for agent sync
3. Access control complexity:
   ○ Single team/queue (simple)
   ○ Multiple teams with different analytics needs (moderate)
   ○ Complex role-based permissions across BPOs/regions (complex)
   ○ Multi-tenant requirements (separate instances per brand/division)
4. Agent privacy & permissions:
   ○ All managers can access all agent calls
   ○ Hierarchical access (managers see only their team)
   ○ Role-based access (QA vs. coaching vs. reporting)
   ○ Agent self-review access needed

Vendor Evaluation Questions

For each vendor under consideration, document:

Vendor Name: _____

- SSO protocols supported: _____
- User provisioning methods: _____
- Setup time estimate: _____
- Documentation quality (1-5): ___
- IT resource hours required: _____
- Granular permission controls: Yes / No

Red Flags to Watch:

- Requires custom development for SSO
- No automated user provisioning
- Vague timeline estimates ("it depends")
- Poor/outdated API documentation
- Limited role-based access controls

Section B: Contact Center & Telephony Integration

Current State Assessment

1. What contact center platform(s) do you use?
    - Five9
    - Genesys Cloud / PureCloud
    - Amazon Connect
    - Talkdesk
    - Nice CXone
    - Aircall
    - RingCentral
    - Twilio Flex
    - Other: _____
    - Multiple platforms
2. Call recording source:
    - Native contact center platform recording
    - Separate call recording system: _____
    - Need vendor to record calls
    - Mix of sources
3. What data needs to flow FROM contact center platform to analytics tool?
    - Call recordings (audio files)
    - Call metadata (duration, queue, disposition, etc.)
    - Agent information
    - Customer information (ANI, account ID, etc.)
    - Screen recordings
    - Chat/email transcripts
    - Custom attributes/tags
4. Real-time vs. post-call analysis needs:
    - Real-time agent assist required
    - Post-call analysis only
    - Both real-time and post-call

Vendor Evaluation Questions

Vendor Name: _____

Contact Center Integration:

- Native integration with our platform: Yes / No
- Integration method: Native / API / Screen recording / Other
- Call import method: Automatic / Manual upload / Real-time stream
- Supported audio formats: _____
- Maximum file size: _____
- Metadata fields captured: _____

Recording Access:

- Can access recordings directly from contact center: Yes / No
- Requires duplicate storage: Yes / No
- Real-time streaming supported: Yes / No
- Batch processing time: _____

Setup Requirements:

- API keys/credentials needed: _____
- Firewall/IP whitelisting required: Yes / No
- Webhook configuration: Yes / No
- Estimated setup time: _____
- Customer references with our platform: _____

Red Flags to Watch:

- No native integration with your contact center platform
- Requires screen recording only (unreliable for audio)
- Cannot handle your call volume
- Long processing delays (>24 hours for analysis)
- Requires expensive middleware

Section C: CRM & Business System Integration

Current State Assessment

1. What CRM system do you use?
   - Salesforce
   - HubSpot
   - Zendesk
   - Microsoft Dynamics
   - ServiceNow
   - Custom CRM
   - Other: _____
   - No CRM
2. What data needs to flow INTO the call analytics platform?
   - Customer account information
   - Case/ticket context
   - Customer journey/history
   - Product/service details
   - Custom fields/attributes
   - Agent performance data
3. What data needs to flow FROM call analytics back to CRM?
   - Call summaries/transcripts

- Sentiment scores
- Compliance flags
- Action items/follow-ups identified
- Customer intent/topic classification
- Agent performance metrics
- Quality scores
4. Integration timing needs:
    - Real-time (during call)
    - Near real-time (within minutes)
    - Batch sync (hourly/daily)
    - Manual export acceptable

Vendor Evaluation Questions

Vendor Name: _____

CRM Integration Capabilities:

- Native integration available: Yes / No
- Bi-directional sync: Yes / No
- Fields that can be synced: _____
- Custom field mapping: Yes / No
- Sync frequency: Real-time / Scheduled / Manual

Data Enrichment:

- Can pull CRM context before analysis: Yes / No
- Automatic call-to-case linking: Yes / No
- Conversation intelligence features: _____

Setup Requirements:

- CRM admin permissions needed: Yes / No
- Custom objects/fields required: Yes / No
- Setup time estimate: _____
- Ongoing maintenance required: Yes / No

Red Flags to Watch:

- No CRM integration available
- One-way sync only
- Requires expensive middleware (Zapier, Workato)
- Limited field mapping
- Cannot handle custom objects

Section D: Data Integration & Reporting

Current State Assessment

1. Reporting/analytics requirements:
   - Export to existing BI tool (Tableau, PowerBI, Looker, etc.)
   - Daily/weekly automated reporting
   - Real-time dashboard needs
   - Ad-hoc data exports acceptable
   - Integration with data warehouse required
2. What metrics/data do you need to export?
   - Call transcripts
   - Sentiment analysis results
   - Topic/keyword tracking
   - Agent performance scores
   - Compliance violations
   - Customer satisfaction indicators
   - Conversation trends
   - Custom tags/categories
3. Data export frequency needed:
   - Real-time (API webhooks)
   - Hourly
   - Daily
   - Weekly
   - On-demand only
4. Data retention needs:
   - Call recordings: ___ months/years
   - Transcripts: ___ months/years
   - Analytics data: ___ months/years

Vendor Evaluation Questions

Vendor Name: _____

Data Export Capabilities:

- Export formats (CSV, JSON, Parquet, etc.): _____
- API access included in tier: Yes / No
- Webhook support: Yes / No
- Data retention policy: _____
- Custom field/metric support: Yes / No
- Bulk export limits: _____

API Quality Assessment:

- REST API available: Yes / No
- GraphQL available: Yes / No

- Documentation completeness (1-5): ___
- Rate limits: _____
- Authentication method: _____
- Sandbox environment available: Yes / No
- Versioning/backward compatibility policy: _____

Pre-built Reporting:

- Out-of-box dashboards: _____
- Custom dashboard builder: Yes / No
- Scheduled report delivery: Yes / No
- Report embedding (iframe): Yes / No

Red Flags to Watch:

- No API for data export
- Excessive rate limits for your call volume
- Additional fees for API access
- Proprietary formats only
- Short data retention (< your needs)

Section E: Speech Analytics & AI Capabilities

Current State Assessment

1. Languages/accents your contact center handles:
    - Primary language(s): _____
    - Secondary languages: _____
    - Accent diversity: High / Medium / Low
    - Multiple languages per call: Yes / No
2. Audio quality considerations:
    - High-quality digital recordings
    - Some background noise
    - Challenging audio (crosstalk, low volume)
    - VoIP quality issues
    - Mobile call quality
3. Analytics use cases (priority order):
    - Compliance monitoring (script adherence, disclosures)
    - Quality assurance scoring
    - Agent coaching/performance
    - Customer sentiment analysis
    - Topic/intent identification
    - Sales conversion insights
    - Call deflection opportunities
    - Competitive intelligence

- Product feedback mining
4. AI/ML requirements:
  - Custom keyword tracking
  - Custom categories/topics
  - Custom sentiment models
  - Predictive analytics (churn, upsell)
  - Automated quality scoring
  - Real-time agent alerts

Vendor Evaluation Questions

Vendor Name: _____

Speech Recognition Accuracy:

- Languages supported: _____
- Claimed accuracy rate: ___%
- Accuracy with accents/background noise: _____
- Speaker separation (agent vs. customer): Yes / No
- Can handle poor audio quality: Yes / No

AI/Analytics Features:

- Sentiment analysis: Yes / No (Granularity: Call / Utterance)
- Topic/intent detection: Auto / Custom / Both
- Keyword spotting: Yes / No
- Phrase detection (not just keywords): Yes / No
- Emotion detection: Yes / No
- Custom model training: Yes / No (Timeline: _____)

Customization:

- Industry-specific models available: Yes / No
- Can upload custom vocabulary: Yes / No
- Custom category creation: Yes / No (Limit: _____)
- AI model retraining frequency: _____

Accuracy Validation:

- Can test with sample calls before pilot: Yes / No
- Transparency on model updates: Yes / No
- Human review/correction workflow: Yes / No

Red Flags to Watch:

- Poor accuracy with your languages/accents

- Cannot customize to your use cases
- "Black box" AI with no transparency
- No validation/testing before commitment
- Overpromising accuracy (>95% without testing)

Section F: Security & Compliance Requirements

Current State Assessment

1. Regulatory compliance requirements:
   - PCI-DSS (payment card data)
   - HIPAA (healthcare information)
   - GDPR (EU data protection)
   - CCPA (California privacy)
   - TCPA (telemarketing regulations)
   - SOC 2 Type II
   - ISO 27001
   - Industry-specific: _____
2. Call recording consent & disclosure requirements:
   - Two-party consent states
   - Specific disclosure language required
   - Opt-out mechanisms needed
   - Legal hold/e-discovery requirements
3. Data residency requirements:
   - Must store data in specific geography: _____
   - No international data transfer
   - No restrictions
4. Sensitive data handling:
   - PCI redaction (credit card numbers)
   - PII redaction (SSN, addresses, etc.)
   - PHI redaction (health information)
   - Pause recording capabilities
   - Secure payment capture integration
5. Security requirements:
   - Encryption at rest and in transit
   - Regular penetration testing
   - Data Processing Agreement (DPA) required
   - Right to audit vendor security
   - Multi-factor authentication (MFA) required
   - IP whitelisting/access controls
   - Role-based access control (RBAC)
   - Call recording access audit logs

Vendor Evaluation Questions

Vendor Name: _____

Compliance Certifications:

- SOC 2 Type II: Yes / No (date: _____)
- ISO 27001: Yes / No (date: _____)
- PCI-DSS Level: _____
- HIPAA: Yes / No
- GDPR compliant: Yes / No
- Other: _____

Data Handling:

- Data hosting location(s): _____
- Sub-processors disclosed: Yes / No
- DPA standard or negotiable: _____
- Data deletion on exit: Timeframe: _____
- Backup/disaster recovery SLA: _____
- Data retention controls: _____

Security Features:

- Encryption standards: _____
- PII/PCI redaction: Automatic / Manual / No
- Redaction accuracy: ___%
- MFA available: Yes / No
- SSO required or optional: _____
- Audit logging: Yes / No (Retention: _____)
- Penetration testing frequency: _____
- Bug bounty program: Yes / No

Call Recording Compliance:

- Consent management features: Yes / No
- Disclosure tracking: Yes / No
- Opt-out handling: Yes / No
- Legal hold capabilities: Yes / No
- E-discovery export format: _____

Access to Security Documentation:

- Security whitepaper available: Yes / No
- Pentest results shared: Yes / No
- Reference customers for security review: Yes / No

Red Flags to Watch:

- Cannot provide required certifications
- Vague answers about data location
- No PCI/PII redaction (if you need it)
- No DPA or heavily restrictive terms
- Cannot demonstrate encryption standards
- Unwilling to share security documentation
- No audit trail for recording access

Section G: Scalability & Performance

Current State Assessment

1. Expected usage:
   - Pilot agent count: _____
   - Full rollout agent count: _____
   - Daily call volume: _____
   - Monthly call volume: _____
   - Peak concurrent calls: _____
   - Growth projection (next 2 years): _____
2. Call characteristics:
   - Average call duration: ____ minutes
   - Call volume spikes (seasonal, campaign): Yes / No
   - 24/7 operations: Yes / No
   - Multiple time zones: Yes / No
3. Performance requirements:
   - Real-time analysis required (< 1 min lag)
   - Near real-time acceptable (< 15 min)
   - Batch processing acceptable (< 24 hours)
   - Must support peak call volumes without degradation
   - Global user base (multiple regions)

Vendor Evaluation Questions

Vendor Name: _____

Scalability:

- Call volume limits on pilot tier: _____
- Agent/user limits: _____
- Upgrade path: _____
- Additional costs at scale: _____
- Storage limits: _____
- Overage fees: _____

Processing Performance:

- Transcription speed: Real-time / X minutes per hour of audio
- Analysis latency: _____
- Batch processing capacity: ___ calls/day
- Peak load handling: _____
- Queue/backlog visibility: Yes / No

Performance Guarantees:

- Uptime SLA: _____
- Processing SLA: _____
- Support for peak concurrent usage: _____
- CDN/global infrastructure: Yes / No
- Disaster recovery RTO/RPO: _____

Infrastructure:

- Cloud provider: _____
- Multi-region deployment: Yes / No
- Scalability proven at your volume: Yes / No
- Customer references at similar scale: _____

Red Flags to Watch:

- Unclear pricing at scale
- Call volume limits below your needs
- Poor uptime track record
- No SLA offered
- Cannot handle call volume spikes
- Processing delays reported by customers
- Limited infrastructure in your geographic region

Part 3: Executive Summary Template

Use this format to communicate findings to stakeholders:

Technical Feasibility Assessment: [Vendor Name]

Recommendation: Proceed with pilot / Proceed with caution / Do not proceed

Integration Complexity: Low / Medium / High

Key Findings:

- Contact Center Integration: [1-2 sentence summary]

- Speech Analytics Accuracy: [1-2 sentence summary with tested accuracy %]
- CRM Integration: [1-2 sentence summary]
- Security/Compliance: [1-2 sentence summary]
- Scalability for [X] calls/month: [1-2 sentence summary]

Implementation Estimate:

- IT hours required: ___
- Timeline: ___ weeks
- External vendor support needed: Yes/No

Identified Risks:

1. [Risk + mitigation plan]
2. [Risk + mitigation plan]
3. [Risk + mitigation plan]

Technical Blockers: [None / List any showstoppers]

Pilot Success Criteria:

- SSO working for all pilot agents
- Speech recognition accuracy ≥ X% (based on sample testing)
- Contact center integration stable (100% call capture)
- CRM sync working bidirectionally
- Data exports validated against source system
- No security/compliance concerns
- Agent feedback positive (>X% satisfaction)
- Performance meets SLA (processing time < X hours)
- Demonstrates value in [priority use case]

Part 4: Vendor Questions Template

Copy/paste these into your vendor calls to ensure consistency:

Subject: Technical Integration Questions - [Your Company] Call Analytics Evaluation

Hi [Vendor Team],

We're evaluating your call analytics solution for a pilot with [X] agents handling [Y] calls/month starting [date]. To assess technical feasibility, please provide the following information:

Authentication & Access

1. What SSO protocols do you support? (We use [protocol])
2. What is the typical setup time for SSO integration?

3. Do you support automated user provisioning? If so, what methods?
4. Can you provide SSO integration documentation?
5. What role-based access controls are available?

Contact Center Integration 6. Do you have a native integration with [our contact center platform]? 7. If yes, what data is automatically captured? (recordings, metadata, screen recordings, etc.) 8. If not, what alternative integration methods are available? 9. What is the setup process and timeline? 10. Can we test the integration in a sandbox before the pilot? 11. Do you have customer references using [our contact center platform]?

Call Recording & Audio 12. How are call recordings transferred to your platform? 13. What audio formats do you support? 14. What is the maximum file size/duration? 15. How do you handle poor audio quality? 16. What is your processing time for a typical [X]-minute call?

CRM Integration 17. Do you have a native integration with [our CRM]? 18. What data can be synced bidirectionally? 19. Can you support custom fields/objects? 20. What is the sync frequency (real-time, batch, etc.)? 21. What is the setup process and timeline?

Speech Analytics & AI 22. What languages do you support? (We need [languages]) 23. What is your transcription accuracy rate for [our language/accent]? 24. Can we test accuracy with sample calls before committing? 25. What AI/analytics features are included? (sentiment, topics, intent, etc.) 26. Can we create custom categories/keywords/models? 27. What is the timeline for custom model training?

Data Export & API 28. What APIs are available for data export? 29. What data export formats do you support? 30. Are webhooks available for real-time data sync? 31. What are your API rate limits for [our call volume]? 32. Can we test API access in a sandbox environment? 33. What is your data retention policy?

Security & Compliance 34. Please provide current SOC 2, ISO 27001, and [required certifications] 35. Where is data hosted geographically? 36. Do you offer PCI/PII redaction? If yes, what is the accuracy rate? 37. Can you provide your standard DPA? 38. What is your data deletion process upon contract termination? 39. How do you handle call recording consent and disclosure requirements? 40. How often do you conduct penetration testing?

Scalability & Performance 41. What are the call volume limits for the pilot tier? 42. What is pricing for [X] agents and [Y] calls/month? 43. What is your uptime SLA? 44. What is your processing/transcription SLA? 45. How do you handle peak call volumes?

Pilot Support 46. What level of support is included during a pilot? 47. What is your typical response time for technical issues? 48. Will we have a dedicated implementation contact? 49. What training/onboarding is provided?

Please provide responses by [date]. We'd also like to:

- Upload 5-10 sample calls to test transcription accuracy

- Schedule a technical deep-dive call with your integration team
- Speak with 2-3 customer references in similar industries

Thanks, [Your name]