

## Vetting Your Vendors

Having the right tools in place is paramount to building a functional ecosystem for your IDW's (Intelligent Digital Workers). There are many platforms and tools out there that can help cover some of the various bases we've outlined and can help facilitate fruitful builds. To the best of our knowledge, CS2.0 is currently the only platform that addresses all of the needs we've identified for creating an intelligent ecosystem of digital workers, but that doesn't mean there aren't other ways to go about building one. Here are some helpful guidelines to help you find the right vendor or platform.

## Bake-Offs - The New RFP

RFPs are being jettisoned across industries in favor of bake-offs because the latter approach offers a more hands-on, efficient approach to finding solutions that will meet organizational needs. This is especially true if your goal is hyperautomation. The fastest way to find out if and how a solution can be applied to the problems you want to solve is to see it in action, solving those problems. Comparing the same proof of concept baked on multiple platforms is a great way to find the one that fits.

That's not to say that you shouldn't be thorough. There's a reason that RFPs often stretch past the 100-page mark, and hyperautomation is no less complex than other technological endeavors (on the contrary, it's uniformly more complex).

Ultimately, you're in the midst of a process that requires flexibility and speed. For many organizations who haven't yet fully adopted faster, more iterative models for operating, adding a bake-off to the vendor selection or procurement is incredibly valuable but some may not be able to fully replace RFPs with them.

Sending out requests for proposals, waiting for proposals, comparing proposals, and then pursuing the best ones is a process that extends often already lengthy requirements gathering and implementation processes. A two- or three-day proof-of-concept bake-off can often accelerate these processes, but for many organizations it is an additive to the RFP process, not a replacement.

Either way, any platform worth its salt will be capable of propping up a sample experience surrounding your needs. If they can't do that, chances are their platform

isn't going to lend itself well to hyper-automation. We designed CS2.0 to be easy enough to use that prototyping and participating in bake-offs is actually quite fun and illuminating.

Hyperautomation hinges on design input from people with varying technical abilities working across your organization. If a solution can't be activated quickly and easily and without heavy technology lifting, it likely won't work well, or won't be fast, or both.

## Ask Vendors A Lot Of Questions

You can make your search for the right tools a whole lot shorter by asking the right questions up-front. You'll most certainly regret spending hours or days exploring a platform only to find out later that it won't meet critical basic requirements for a scalable strategy. Asking these types of questions can help narrow your search more efficiently:

What types of Voice and NLU capabilities do you have?

- Market leadership on NLU is constantly in flux. Can you show that you've future-proofed your NLU?
- Can you utilize multiple STT, TTS, and NLU engines?
- Are you tied to individual NLU platforms and AI engines or is there portability between applications to account for new providers entering the marketplace?

What communication channels can you create conversational experiences on?

- Can you use multiple channels—Phone, SMS, MMS, and Email—during the same continuous conversation interchangeably while maintaining context?
- Are you tied to specific communication channel providers for channels like phone, SMS, and WhatsApp, or will your solutions be portable to other similar providers?

What limitations are there surrounding development and deployment?

- What kind of analytics are available to facilitate fast and meaningful iterating?
- How quickly can experiences be created and deployed?
- What skill levels are required to design, develop, deploy and iterate on solutions and experiences?
- Will you be able to equip non-developers and developers alike to create conversational AI applications and task automation, or will it require developers to build your solutions?
- Will you have access to libraries and templates or will those need to be built from scratch?
- If the tools and templates you have access to are no-code, how flexible are they?

How hard is it to train new users on the platform?

What capabilities and controls are accessible to end users and which aspects are behind the wall?

What level of investment (in terms of experts, departments, technologies, and timelines) will be needed across all aspects of design and deployment (including development, reporting, security, and scaling)?