

From Cost Center to Growth Driver

The CX leader's playbook for winning the budget, how to get contact center modernization approved in the room where the money is decided.

THE 40-SECOND VERSION:

Your results are real. You're still losing the budget meeting. That's a translation problem, and it's fixable. This playbook is about the room where budgets get decided, who sits in it, what each person needs to hear, when to make the ask, and how to answer the CFO's three objections before they're spoken. You already have the wins. Here's how to get them funded.

Your Case, on One Card

Bring these five numbers into the room. They're UJET's reference benchmarks (sourced under the table), the frame for your ask; your real numbers set the ask itself.

What leadership funds	The benchmark that speaks to it
Payback on the investment	~23-month payback (G2-reported)
Lower cost to serve	30–50% lower operating costs; \$2–\$8 off per contact
Lower total cost of ownership	40–60% lower TCO over three years
Fast to value	~2-month implementation (G2)
A more stable team	Up to 50% lower agent turnover

Where these come from: payback (~23 months) and implementation time (~2 months) are from UJET's third-party G2 profile. The rest, operating-cost reduction, cost-per-contact savings, TCO reduction, and agent-turnover reduction, are UJET business-case benchmarks: modeled reference ranges from UJET's own analysis, backed by the customer results in this guide (a major US bank's 10% cost reduction, a streaming provider's 23% AHT cut, Capital on Tap's 92% SLA, Zettle's halved training). Reference ranges, not guarantees; UJET-authored analysis, not independent measurement.

Contents

(01)	You Have the Wins. You're Losing the Room.	→
(02)	Who's Actually in the Room	→
(03)	Translate Your Wins into the Three Things Leadership Funds	→
(04)	Build the One-Page Business Case	→
(05)	Time the Ask	→
(06)	Win the Room: The CFO's Three Objections, Scripted	→
(07)	Prove You Can Run It: The 30/60/90	→
(08)	Proof You Can Point To	→
(09)	Make the Case with Us	→

(01) You Have the Wins. You're Losing the Room.

You can see the impact your contact center has on the business every day, in handle time, first-contact resolution, service level, CSAT. You know that when those numbers move, retention and reputation move with them. Then the modernization proposal reaches leadership, lands in a room that runs on cost, risk, and revenue, and stalls. The function that touches nearly every customer keeps getting managed as overhead.

That is a failure of translation, and translation is a learnable skill. The category you're selling has a name, the **Experience Center**: a contact center run

as a revenue engine instead of a cost line. Your job in the budget meeting is to make that reframe land in the language the room already uses. This playbook hands you the moves: who to convince, what each person needs, when to ask, and how to answer the objections before they're raised.

One reframe to carry through all of it: this is a plan to make a line item leadership already owns return more than it does today. Walk in with that posture and the whole conversation shifts from defending a request to guiding a decision.

(02) Who's Actually in the Room

The budget meeting is rarely one person saying yes. It's a small committee, each member weighing a different risk. Win all four, the one who signs is listening to the other three.

- **The CFO** wants a return they can defend, payback period, an ROI band, and proof the baseline won't drift. Give them cost, risk, revenue.
- **IT / the CIO** wants to know what this does to the stack and the security posture. Your best friend here is architecture: a platform built natively on Google Cloud, CRM-first, purchased through the Google Cloud Marketplace against existing cloud commit, with no customer PII stored on the vendor's servers. That neutralizes the integration and data-risk objection before IT raises it.

- **The COO** wants operational continuity, no service cliff during migration, and a plan for adoption.
- **Procurement** wants predictable, transparent pricing with no usage-based surprises. Marketplace-based pricing answers that directly.

Map your case to these four before the meeting. The fastest way to lose is to bring a CX argument to a room where three of the four people are weighing something else.

(03) Translate Your Wins into the Three Things Leadership Funds

Modernization gets approved when it improves at least one of three things leadership already tracks. Frame every win you own against these, and you've built the spine of the case.

Cost to serve, operating expense per interaction, staffing to handle volume, and total cost of ownership across a sprawl of add-ons. **Risk and resilience**, exposure from downtime, compliance gaps, and preventable churn. **Revenue impact**, retention, conversion, upsell, and churn on high-value accounts.

Your wins arrive through six levers, and you almost certainly own results in several already:



Handle time down as after-call work is automated → cost.



Repeat contacts down as resolution quality improves → cost.



Service levels up, SLA, abandonment, speed to answer → risk and revenue.



Volume shifted to digital and self-service → cost.



Agent ramp and turnover down as training shrinks → cost.



TCO down as tools consolidate onto one platform → cost.

Take your three strongest results and write the financial translation next to each before you walk in. Handle time becomes recovered agent hours. Service level becomes retained revenue on at-risk accounts. Resolution quality becomes avoided repeat-contact cost. That single act, doing the translation for the room instead of leaving it to them, is what separates an approved case from a filed one.

(04) Build the One-Page Business Case

Leadership doesn't read a deck; they scan a page. Structure it so a busy CFO gets the whole argument in ninety seconds:

- 1 **The ask**, one line: what you want to fund and the expected return band.
- 2 **The problem in their language**, cost, risk, or revenue currently leaking, with a number.
- 3 **Your three translated wins**, operational result → financial outcome, one line each.
- 4 **The model**, annual OpEx savings, payback period, and an ROI range across best, base, and worst cases.
- 5 **The proof**, two or three outside results that match your situation (Chapter 8).
- 6 **The governance**, your 30/60/90 adoption plan (Chapter 7).

The model in line 4 is the part champions most often fake with a guessed number, and it's the part finance trusts least. You don't have to guess. Run the interactive ROI estimate for a first-pass figure in minutes, then have a UJET sales engineer build the defensible version with you on your real baseline. Walk in with the number, not the conviction.

(05) Time the Ask

A good case presented at the wrong moment loses.
Two timing rules:

Get ahead of the budget cycle. Bring the case while next year's numbers are still being shaped, before they're locked. A modernization ask that arrives mid-cycle competes with nothing on the calendar and everything already committed.

Bring finance in early, on purpose. Don't ambush the CFO with a finished proposal. Share the

framing and the draft model before the formal meeting and let them pressure-test it. A CFO who helped shape the baseline defends the number in the room instead of picking it apart. Early involvement turns your toughest reviewer into your co-author.

(06) Win the Room: The CFO's Three Objections, Scripted

These three come up in almost every finance review. Walk in with the answers built, and you shift from defending to guiding.

When they say: "I don't trust operational metrics."

Say: "Neither should you, on their own. So I've tied each one to a financial outcome, handle time to recovered agent hours, service level to retained revenue on at-risk accounts, resolution quality to avoided repeat-contact cost, with fixed before-and-after windows and a set reporting cadence so the baseline can't drift." If they push on the baseline, add: "The baseline is built on 100% of our conversations, not a 2% QA sample, that's the job Spiral does, so the starting number is defensible."

When they say: "What about hidden costs?"

Say: "I've put the full TCO on the table already, implementation, telecom, analytics, QA and WFM add-ons, integration maintenance, IT overhead. Pricing is transparent and marketplace-based, purchased through Google Cloud Marketplace against our existing cloud commit, so there are no usage-based surprises to forecast around." Raising this first signals rigor and buys you trust for the rest of the ask.

When they say: "What if adoption is low?"

Say: "Adoption is the risk most in my control, so I'm governing it." Then show the 30/60/90 (next chapter). This turns their sharpest objection into a demonstration that you've already thought like them.

(07) Prove You Can Run It: The 30/60/90

Adoption is where CX leaders win or lose credibility after the yes.

Bring a plan they can hold you to:

- **First 30 days**, baseline captured, KPIs defined: share of interactions using AI assist, share of contacts shifted to self-service, share of agents using integrated workflows.
- **By 60 days**, first adoption checkpoint with leadership; early movement reported against baseline.

- **By 90 days**, value realization tracked on a schedule you report against.

Attach executive checkpoints to each. Value realization becomes something you report against, which is exactly what turns a one-time approval into a trusted track record for your next ask.

(08) Proof You Can Point To

Pick the two or three closest to your situation and drop them into the case as evidence.



A major US regional bank modernized and shifted routine service to digital: 15% lower call volume, 10% lower contact center cost, 50% more digital chat



EverWash cut average response time 70% (60+s to 18s).



A leading streaming service cut average handle time 23% with a unified desktop and AI assist.



Capital on Tap lifted SLA attainment to 92%, cut hold time 12%, raised CSAT 4.4 to 4.6, and answers 90% of calls in under 20 seconds.



Zettle by PayPal raised CSAT 10% and halved agent training time at a lower cost than its previous solution.

FOR BREADTH:

TURO

Turo improved SLA 91%, cut AHT 28 seconds, lifted CSAT 5%.

Wag!

Wag! improved SLA 17%, halved average wait, dropped abandonment 7%.



A blinded grocery-delivery company resolved contacts 30% faster and improved SLA 18% on voice and 23% on chat.



A blinded mobility platform improved SLA 61% over three years while scaling from 40 to 242 agents and routing 65% fewer calls to live agents.

(09) Make the Case with Us

This playbook gives you the room, the committee, the timing, the scripts, and the proof. The one thing that turns all of it into a yes is a number built on your real operation, and that isn't a solo, fill-in-the-blank exercise.

Two ways to get the number:

- 1 **Run the interactive ROI estimate** for a first-pass savings and payback figure in minutes, enough to size the opportunity and start the internal conversation. Start at ujet.cx/roi
- 2 **Book an ROI review** and a UJET sales engineer builds the defensible model with you on your real baseline: annual OpEx savings, payback period, and an ROI band you can carry straight into the room.

Bring what you already track, monthly volume, baseline handle time, fully-loaded agent cost, current tool spend, target service levels. That's enough to build a first-pass case in one session.

NEXT STEP

Get the first number from the calculator today. Book the ROI review to make it board-ready. Then walk into the budget meeting with the case already built.

Start here: ujet.cx/resources/tools/roi