



## Opportunity Quick Guide

### *Selling Bucher + Suter CRM integrations*

### Overview

The purpose of this Opportunity Quick Guide is to analyze customer requirements for the b+s/Cisco combined offer to help ensure a smooth and comprehensive implementation. The document consists of the following sections:

- Identifying and qualifying a **b+s Connects for Salesforce – CCE or CCX** Opportunity
- Identifying and qualifying a **b+s Connects for Salesforce – UCM Edition** Opportunity
- Identifying and qualifying a **b+s Connects for Microsoft Dynamics CRM** Opportunity
- Identifying and qualifying a **b+s MCA for SAP** or **b+s MCA for Siebel** Opportunity
- Identifying and qualifying a **b+s Connects Harmony for Oracle CX** Opportunity

Please email the completed questionnaire to: [info@bucher-suter.com](mailto:info@bucher-suter.com)

If you require assistance with any opportunity, please contact:

**Bucher + Suter Sales: 1-800-917-9060 or +41 31 917 52 00**

### Customer information

Customer Name:

---

Customer Location:

---



## Identifying and qualifying a b+s Connects for Salesforce – CCE or CCX Opportunity

1.	How many agents need this integration?	
2.	Does the customer already own Cisco's Unified Contact Center or do they plan to purchase it? Which version?	
3.	Do they already own or plan to own Salesforce CRM?	
4.	Do they use or plan to use Salesforce Lightning?	
5.	Do they already use a Cisco/Salesforce connector?	
6.	Does the customer use Salesforce in Console mode?  <i>They can check by going to setup – type "Company Profile" – select "Company Information" – click "Feature Licenses". If they see "Service Cloud User" "Active" it means they do have it.</i>	
7.	Do they use or want to use Salesforce's email to case functionality?	
8.	Do they use or want to use Salesforce's LiveAgent chat functionality?	
9.	Do they use or want to use Cisco's Outbound Option for automated outbound campaigns? Preview or predictive dialing?	
10.	Any requirements and/or important features we should focus on?	
11.	What do their customers typically want to discuss when calling their contact center?	
12.	What percentage of the telephone traffic is inbound vs. outbound?	
13.	What is their target time frame to integrate?	
14.	Are they going to use a Salesforce integrator for this project? If so, who?	



## Identifying and qualifying a b+s Connects for Salesforce – UCM Edition Opportunity

1.	Does the customer own or plan to own Cisco's Unified Communications Manager (UCM)? Which version?	
2.	What type of Cisco devices do they use; hardphones or softphones?	
3.	How many employees need this integration?	
4.	What kind of calls do most of the users make or take?	
5.	Does the customer already own or plan to own Salesforce CRM?	
6.	Do they use or plan to use Salesforce Lightning?	
7.	Do they already use a Cisco/Salesforce connector?	
8.	Does the customer use Salesforce in Console mode?  <i>They can check by going to setup – type "Company Profile" – select "Company Information" – click "Feature Licenses". If they see "Service Cloud User" "Active" it means they do have it.</i>	
9.	Do they use or plan to use Jabber IM?	
10.	Any requirements or important features we should focus on?	
11.	What is their target time frame to integrate?	
12.	Do they use or plan to use a Salesforce integrator for this project? If so, who?	



## Identifying and qualifying a b+s Connects for Microsoft Dynamics CRM Opportunity

1.	How many agents need this integration?	
2.	Does the customer already own Cisco's Unified Contact Center or do they plan to purchase it? Which version?	
3.	Do they already own or plan to own Microsoft Dynamics CRM?	
4.	Do they already use a Cisco/Microsoft Dynamics CRM connector?	
5.	Do they use or want to use Microsoft Dynamics email but routed and reported on by Cisco?	
6.	Do they use or want to use Cisco's Outbound Option for automated outbound campaigns? Preview or predictive dialing?	
7.	Any requirements or important features we should focus on?	
8.	What do their customers typically want to discuss when calling their contact center?	
9.	What percentage of the telephone traffic is inbound vs. outbound?	
10.	What is their target time frame to integrate?	
11.	Are they going to use a Microsoft Dynamics integrator for this project? If so, who?	



## Identifying and qualifying a b+s MCA for SAP or b+s MCA for Siebel Opportunity

1.	How many agents need this integration?	
2.	Does the customer already own Cisco's Unified Contact Center or do they plan to purchase it? Which version?	
3.	Do they already own or plan to own SAP or Siebel CRM?	
4.	Do they already use a Cisco/SAP or Siebel connector?	
5.	Do they use or want to use SAP or Siebel email but routed and reported on by Cisco?	
6.	Do they use or want to use SAP or Siebel chat but routed and reported on by Cisco?	
7.	Do they use or want to use Cisco's Outbound Option for automated outbound campaigns? Preview or predictive dialing?	
8.	Any requirements or important features we should focus on?	
9.	What do their customers typically want to discuss when calling their contact center?	
10.	What percentage of the telephone traffic is inbound vs. outbound?	
11.	What is their target time frame to integrate?	
12.	Are they going to use an SAP or Siebel integrator for this project? If so, who?	



## Identifying and qualifying a b+s Connects Harmony for Oracle CX Opportunity

1.	How many agents need this integration?	
2.	Does the customer already own Cisco's Unified Contact Center or do they plan to purchase it? Which version?	
3.	Do they already own or plan to own Oracle Service Cloud (OSC)?	
4.	Do they already use a Cisco/OSC connector?	
5.	Do they use or want to use OSC chat but routed and reported on by Cisco?	
6.	Do they use or want to use OSC email but routed and reported on by Cisco?	
7.	Do they use or want to use Cisco's Outbound Option for automated outbound campaigns? Preview or predictive dialing?	
8.	Any requirements and/or important features we should focus on?	
9.	What do their customers typically want to discuss when calling their contact center?	
10.	What percentage of the telephone traffic is inbound vs. outbound?	
11.	What is their target time frame to integrate?	
12.	Are they going to use an OSC integrator for this project? If so, who?	