



White Paper

Cisco – Salesforce: a New Phase in Collaboration

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Nik Zanetti, Technical Writer



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Part 1: new possibilities with Cisco & Salesforce

Executive Summary

Salesforce and Cisco have announced that they will be working together to develop and market solutions for Cisco's collaboration, IoT, and contact center platforms with Salesforce Sales Cloud, IoT Cloud, and Service Cloud. This means that two industry leaders in the contact center, CRM space will be working in tandem, rather than in parallel, to provide natively integrated products that utilize cutting edge technology to create business opportunities heretofore unobtainable. Until now, these two companies have offered somewhat overlapping services in the contact center space, each emphasizing different service features, delivered in different ways. Going forward, these companies will be *collaborating* in the same market space to create a single set of native offerings designed to provide customers using those platforms unparalleled reach and control in their business environments.

Three cornerstones of business success are:

- driving sales
- identifying and creating marketing opportunities
- and providing superior customer service

“Two industry leaders in the contact center, CRM space will be working in tandem.”

Advances in technology such as Artificial Intelligence, IoT, and Cloud Computing have been changing how businesses *can potentially* go about pursuing success. However, until now, these technologies have been functioning in isolation, or have not been implemented because of cost, lack of infrastructure, or lack of interest. Today, things are changing. The Internet of Things has developed into an untapped ocean of data and business opportunity. It is estimated that businesses utilize less than 1% of the IoT data available to them. Artificial Intelligence, until recently, relegated to quirky experiments in R&D departments, is being deployed *today* to absorb and learn from the massive amounts of information already on the Internet. And, cloud computing is making it possible for businesses to take advantage of these technology solutions because they are so much cheaper to deploy and configure.

What is so groundbreaking about the Cisco, Salesforce collaboration is that the application of these technologies will be combined into a single, unified service delivery, that will be affordable, easy-to-implement, and unbelievably powerful. In fact, the fusion of these technologies is rapidly redefining what the term customer journey means today, and will mean tomorrow. It will soon be possible to join with customers, in their lives, and their experiences in a way that make service, sales, and marketing seamless, helpful, profitable, and appreciated. The reality is that unobtrusive, satisfying service should be the goals of any business—they are also values that maximize customer satisfaction and company profit.



We are on the verge of seeing some exciting applications of almost science fiction-like technology. Machine learning, artificial intelligence, Internet of Things, and big data applications all driving at improving customer experience, agent experience, and business profitability, are just a few tastes of what is coming. Understanding how these technologies are going to be used, and being in a position to capitalize on their value proposition is what this white paper is all about.

Who should pay attention to this document:

Businesses using, or interested in using, the following service platforms to drive sales and to improve customer service:

- Cisco's collaboration
- IoT
- contact center platforms



Together with:

- Salesforce Sales Cloud
- IoT Cloud
- Service Cloud

Part 2: redefining customer journey

Being a customer can often be frustrating; system inefficiencies create a gap between delivering the products and ongoing services desired, and those paid for. Because customer loyalty is so important to business success, and because that loyalty is so hard to win, being aware of customers' experience over time is incredibly important. It is helpful to think of the totality of this experience the *Customer Journey*. Tracking this journey, and making sure it is as positive as possible are fundamental to providing the kind of customer service that creates loyalty and ultimately drives sales. Historically, absent infrastructure and information, together with rapidly scaling business growth have made tracking customer journey quite difficult. With the advent of new technologies like IoT, Context Services, Einstein, and Cloud Services, businesses now have access to this



information—if they want it, and if they are willing to take steps to extract it. Making the right decisions about which technologies to implement is going to be the difference that makes the difference.

Businesses use Cisco and Salesforce to make it possible to deliver superior service while at the same time leveraging data to create business opportunities; the results of this collaboration are going to revolutionize what it looks like to track customer journey. Specifically, emerging technologies are positioned to transform how companies use data about customers' journeys to drive business sales and customer satisfaction. Ultimately, these two software companies are redefining how businesses can walk with their customers such that service is seamless and yet totally unobtrusive.

Things like Jasper, Cisco's IoT monitoring software, together with Salesforce's AI system, Einstein, are going to give businesses a view of the untapped oceans of information available about things from customer preferences about when they shop, to tracking and monitoring ongoing service provision tools such as trucks, washing machine parts, and consumable household products.

Let's take a look at what all this means practically.

Walking with the customer

Truly seamless one-to-one customer journey mapping has been the *theoretical goal* of customer service in the contact center industry for quite a while now. Developments in technology are now making it increasingly realistic to provide this kind of service by utilizing technologies like Cisco's Context Services, Einstein, and IoT enabled devices. By tracking every part of a customer's interaction with a business, and having that information at agents' fingertips, it becomes possible, not only to provide virtually perfect customer service, but also to anticipate customers' practical needs, and even their desires. This means streamlined interactions with customers. It means that when customers need, want, or even *might want* further services, businesses will be able to anticipate and provide for those needs. It means that before customers even know they are ready for or interested in making purchases, businesses can make those purchase opportunities known so that customers can edify their desires and businesses can drive profits.

So, what does this look like on the ground? Let's take a look...

“With the right information at agents' fingertips, it becomes possible to provide virtually perfect customer service.”



Three use cases

- I. Imagine a customer who owns a Harley Davidson Motorcycle. The customer surfs to the Harley Davidson website and looks at a cool new Harley Jacket that just came out—he isn't quite sure if he wants to buy it, so holds off. A month later, the muffler on his Harley needs replacing, so he calls Harley. The agent he's speaking to can help him with his muffler, but also has data indicating that the customer was looking at a jacket that is now on sale. The customer has forgotten about the jacket, but the agent has the data associated with his search right at their fingertips. The agent reminds the customer about the jacket and alerts him to the sale. The customer ends up buying a new muffler, and goes for the jacket. The result is a win on both sides: a happy customer and an extra sale.
- II. Consider a different scenario in which a customer has an IoT enabled furnace. The furnace alerts the manufacturer that it needs to be serviced soon and will stop working once it reaches a certain use threshold. Instead of alerting the homeowner with a message they may or may not notice, an agent calls the customer to inform them about the immanent part failure, and arranges to send a replacement part. The homeowner, who will soon be taking a break from a harsh winter is now concerned that the part won't arrive in time and that the pipes in the house will freeze. But, she can now use her cell phone to track the device's exact location throughout its entire route to her house. She gets the part just in time, installs it, and takes off for a well-earned vacation, without having to worry about damage to the home.
- III. A sales agent getting ready to make her morning calls. Her AI driven CRM lists the sales calls in order of likelihood of a sale. She makes her way through the list and gets a good lead. Later in the day, she is going to call back to talk to a manager responsible for purchasing at that company. Just as she is about to make the call, she is alerted to the fact that the company's current manufacturer has had an explosion at a plant that will impede supply delivery. The sales agent now goes into the meeting knowing that she has more leverage to drive up the price on her company's services, and is in a position to offer other aligned services in view of this news. On top of it all, she is able to spin her sale's pitch emphasizing her own company's manufacturing reliability.

These are just the sorts of high touch-low profile, preemptive, and proactive interactions are made possible by Cisco Context Services working together with emerging technologies such as Einstein, IoT enabled devices, and big data analysis.



Part 3: Cutting-edge technology meets the sophisticated world of business

IBM estimates that 2.5 quintillion bytes of data are created every day. More astounding is the fact that 90% of the data that exists on the Internet today was created in the last two years.* This is a lot of data—its Big Data. By all estimates, these numbers pale in comparison to how the addition of IoT enabled devices will change these figures. How to engage this data in a meaningful way poses a serious challenge, and a serious opportunity. Analyzed in the right way, this data can reveal amazing trends, and yield valuable insights about how to position business decisions going forward.

Individual instances of data are usually meaningless. However, when data analytics tools can collect and present massive amounts of data in ways that are relevant to business goals, the story changes. Today, there is a huge demand for data analytics experts able to make sense of this data. In fact, it is estimated that there are between 140,000 and 190,000 jobs open for data analytics positions. Even more staggering, there are 1.5 million managers who are not familiar enough with data analytics to make informed and intelligent data-based management strategy decisions.† The lack of competent data analysts is a problem; now there is a workaround: meet Salesforce’s Einstein.

Einstein

Einstein is Salesforce’s new artificial intelligence software. It is able to absorb massive amounts of data from the IoT. With this information, it can direct business managers about the best course of action based on information gathered from data continuously culled from IoT devices and CRM data. The applications for this information translate into smarter sales, service, marketing, and IT services. With Einstein, it will be possible to sell, cross-sell, or upsell the right product at the right time to the right customer. It will be possible to keep customers happy by anticipating problems before they occur, and by providing them with the information they need before they even know they need it. It means positioning and escalating sales in ways that will optimize customer satisfaction as well as business growth. The good news is that implementing Einstein will be easy because it will be natively integrated into the following Salesforce software packages: Sales Cloud, Service Cloud, Marketing Cloud, App Cloud, Analytics Cloud, and Community Cloud. One of the principle ways Einstein can be so effective is its capacity to utilize the Internet of Things to cull valuable information from the world-wide web. Let’s take a look at what exactly that means.

“With Einstein, it will be possible to sell, cross-sell, or upsell the right product at the right time to the right customer.”

* (IBM) <http://www-01.ibm.com/software/data/bigdata/what-is-big-data.html>

† (Mckinsey & Company, 2011) <http://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/big-data-the-next-frontier-for-innovation>



IoT

The Internet of Things are billions and growing. Recently, Cisco acquired a software platform called Jasper. Jasper will allow Cisco customers to launch, manage, and monetize IoT services to a wide range of powerful effects. Because information from so many objects will be available, control of the very structure of service offerings is changing, how those services are managed is changing, and the opportunities created by this abundance of helpful data are cropping up continuously—failing to capitalize on them because of lack of infrastructure or information availability is simply a mistake.

Cisco is envisioning Jasper as a “single pane of glass” providing a view into the IoT ecosystem that provides real time-data about how to manage customer needs, how to plan future product development, and how to manage IoT lifecycles. The ultimate goal is to create a nearly invisible, low-profile way to provide a high-touch customer service experience with fewer human assets and lower deployment costs.



Projected for third quarter, 2017, Cisco Jasper will be seamlessly integrated into the Salesforce IoT Cloud. IoT Cloud is already a powerful analytics engine capable of identifying business opportunities. Now, Cisco Jasper will give Salesforce IoT Cloud exponentially more, ready-to-use data about the IoT. With the trillions of bytes of data provided by Cisco Jasper, Salesforce Einstein will be able to make accurate, real-time decisions and recommend best practice strategies.

The key to leveraging business opportunities created by IoT analysis is complex. It requires clarifying business goals and then bringing them into alignment with the most cost-effective implementations of technology possible—in this case, specifically relating



to IoT investments and developing infrastructure based on those decisions. While it may come as a surprise, producing, distributing, and maintaining IoT devices is very expensive, especially if strategy decisions about the type of IoT devices to create are not aligned with actual business goals. Consequently, a clear upside in this proposition is that Cisco Jasper, together with Salesforce IoT Cloud integration, is going to provide a cheap, easy-to-implement, scalable solution by providing tools that can optimize the IoT data without requiring companies to spend lots of money on in-house solutions.

Context Services

Context Services is a cloud-based storage service that provides a repository for customer journey data. It enables Cisco Contact Center customers to deliver a seamless Omni-channel experience with an out-of-the-box integration from Cisco Customer Collaboration products and APIs for 3rd party integration. Context Service is also channel-agnostic, which allows it to store interaction data from multiple customer care channels such as voice (including IVR), chat, e-mail, and the ever-expanding social media platforms out there today. Additionally, it is possible to store interaction data from emerging channels such as the Internet of Things.

Part 4: What the technical terms of the collaboration will involve

“This collaboration also means no more clunky patch-ups, inelegant fixes, and custom code are required to make the software systems work well together.”

While this collaboration means a lot of sexy new things in terms of sales and service opportunities, there is a lot going on on the back end that makes all of this possible. Since agreeing to collaborate, these two companies have staked out different service spaces within their integrated product offering. Cisco and Salesforce’s collaboration will provide new flexibility for businesses with different needs, making it possible for them to utilize different portions of their integrated offering, depending on the company’s specific needs. With native integration, implementation options that will best fit that company will be easy to provide. For example, use of Salesforce digital channels makes sense when companies prefer agents to have broad, 360-degree customer view. Furthermore, Cisco Spark and WebEx will be natively integrated into Salesforce’s Sales Cloud and Service Cloud, within the new Lightning framework. This solution will mean that businesses can use these WebEx and Spark services like chat, video, and voice without leaving the Salesforce GUI.

This collaboration also means no more clunky patch-ups, inelegant fixes, and custom code are required to make the software systems work well together. Not being forced to flip continuously between windows to access information while providing service is a huge upside that comes with this native integration. However, for mobile users, the difference will be night and day, as toggling between applications on a smaller device is truly cumbersome. Furthermore, native integration in the mobile space will mean much greater product and service viability in that market niche.



In terms of user experience, one thing customers using both platforms will notice is that Cisco has agreed to give control of the desktop to Salesforce's Lightning Console. Underneath the console, Cisco will make use of the Task Routing API (available in Cisco CCE 11.5) to route Salesforce tickets as well as Cisco items. Furthermore, in the voice interaction channel, seamless Cisco Contact Center integration will make it possible for agents working within Lightning Console to make and receive customer calls. And, companies will now also be able to implement Omni-channel handling processes, depending on their service preferences. For example, if the business prefers to focus on optimizing routing decisions, and have a single place for managing agent skill setups, writing business logic scripts, and producing detailed interaction reporting to deliver a 360-degree customer view to their agents, they may elect to focus on using Salesforce digital channels.

Finally, Salesforce will be opening APIs that allow third party "engines" to manage routing of LiveAgent chat and LiveMessage conversations. This important change now makes it possible to use Cisco's universal queue, instead of Salesforce, to control the influx and routing of customer requests. There is an "aha moment" companies experience when they decide to use a single engine and single agent application for interaction handling such that contact centers can then utilize blended agents to field chat, voice, and email requests.

Part 5: Making Connections

At the end of the day, the value of these technologies is to improve human experience. That is what we're all doing here; that is what these systems are trying to accomplish. The tools are coming available to make providing a truly satisfying customer journey possible. Since these separate technologies will soon be available, getting them to work in harmony to deliver on these promised experiences is the next goal. The Cisco, Salesforce collaboration is a tremendous step toward integrating these services in a native environment so that the customer service reality that businesses want to achieve, and customers want to enjoy, can be implemented.

"At the end of the day, the value of these technologies is to improve human experience."

Connecting these two immensely complex service platforms is a daunting task. A task that requires knowhow, experience, and tenacity. Cisco and Salesforce are experts at what they do: developing and implementing technologies that are going to transform business. However, middleware companies like Bucher + Suter are experts at *connecting* the software being created by these two companies. This is where the magic is made. Because the Cisco and Salesforce software platforms were originally developed separately, they did not naturally work together. Nor would it reasonable to expect that these companies spend time developing technologies so that they can work natively together.

So, in order facilitate the sort of native integration Cisco and Salesforce seek to achieve, they have tagged Bucher + Suter to work closely with them to bridge the technologies in many of the areas mentioned above. These three companies will continue to collaborate



and innovate as new ideas and market demands surface; get excited if you employ these two companies' solutions.

Part 6: What Now?

If you are interested in discovering how to implement and optimize these services, if you are interested in learning more about how these services can help drive your business profits, or if you are interested in being proactive about your use of technology in a way that will ensure you are at the crest of this tidal wave of information and opportunity, then call Bucher + Suter. We are *the* trusted Cisco and Salesforce partner, and exist to ensure that the ROI on any technology implementation associated with these companies is done right.

To learn more about the difference that is going to make a difference, contact us at: info@bucher-suter.com

About Bucher + Suter

Bucher + Suter is a Preferred Solution Partner and Advanced Technology Partner that delivers unique add on solutions to Cisco Contact Center, enabling customers to realize additional business value from their Cisco investments. Bucher + Suter has been helping customers implement strategic solutions for decades and today supports some of the largest Cisco Contact Center environments in the world.

