



# White Paper

# CRM Integration

# for Cisco Contact

# Center

# Contents



Introduction	3
CRM Integration Options	3
b+s Fusion for Finesse CRM vs. b+s Connects	4
b+s Connects	4
b+s Fusion for Finesse CRM	5
Conclusion	6
About Bucher + Suter	6

## Introduction

There are a lot of good reasons contact centers today are deciding to integrate their Cisco Contact Center with their CRM software. For example, integrations that provide a unified queue allow agents to handle a variety of media types (email, chat, task, etc.) using a single Cisco routing engine and Cisco reporting system. Enabling CRM based multi-channel interactions in a contact center helps to reduce labor costs since multi-channel agents can effectively handle a larger volume of customer interactions than voice-only agents. A single unified queue provides the highest level of routing accuracy and a truly integrated platform makes consolidated, multichannel historical and real time reporting a reality. Providing the agents with a “single pane of glass” eliminates fumbling between applications, and gives agent access to necessary tools and information in a single GUI. Providing the agent with time saving features such as screen pop and click-to-dial simplify the agent experience, decrease handle times, and save money. The tricky question is how to do this...

## CRM Integration Options

There are several approaches to integrating the Cisco Contact Center with CRM software:

- In-house programming or hiring a consultant to perform custom development
- Out-of-the-box integration with agent controls embedded in the CRM
- Out-of-the-box integration with agent controls embedded in Cisco’s Finesse

Off the shelf CRM connectors provide plug-and-play integration between the Cisco Contact Center and leading CRM solutions on the market today. A productized connector is far easier and less expensive to implement, up-

grade, and maintain than a custom built or homegrown integration. Customers who purchase pre-integrated CRM connectors can take advantage of new features released throughout the year and don’t have to worry about ensuring compatibility with the latest versions of connected software such as the Microsoft OS, browsers, the Cisco Contact Center, and the CRM. Since these out of the box connectors are implemented via configuration rather than programming, companies no longer need to invest the time and money required for custom integration.

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*«Providing the agents with a single pane of glass eliminates fumbling between applications, and gives agent access to necessary tools and information in a single GUI.»*

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Contact centers that elect to build their own integrations or hire consultants to do so must be prepared for the considerable time, effort, and cost involved in taking on a complex and difficult project that requires extensive Cisco and CRM expertise and experience.

Integration with controls embedded inside of the CRM

allows the agent to perform all of his work without leaving the CRM and gives the agent a wide array of time saving features and functionality.

Integrating the CRM using a Finesse based custom gadget gives agents the ability to access the CRM application from inside of Cisco’s Finesse. Agents can take advantage of CRM functionality such as click-to-dial, phone books, activity history, and more without having to leave the Finesse cockpit. These features save time for both the customer and agent, reducing costs and increasing customer satisfaction.

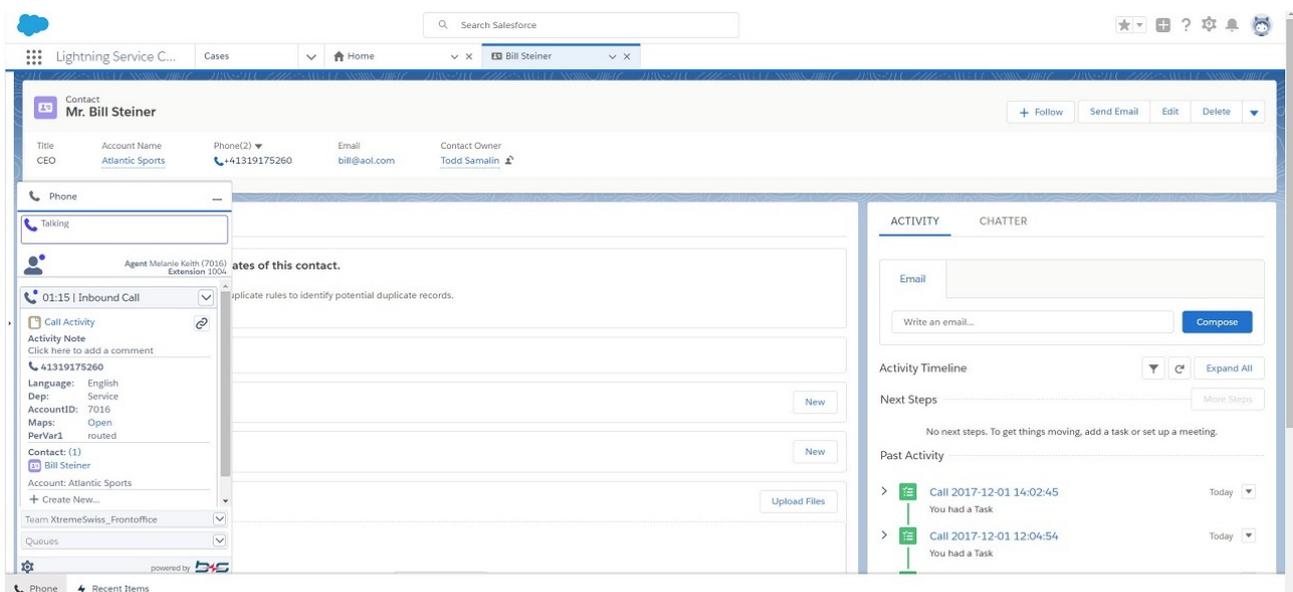
## Fusion for Finesse CRM vs. Connects

Bucher + Suter offers both options for Cisco Contact Center/CRM integration: a gadget embedded in the CRM GUI and a gadget inside Finesse.

## b+s Connects

The first approach is via a Bucher + Suter product called

“b+s Connects”. It is an out-of-the-box integration that allows agents to handle multichannel interactions and manage their state (ready, not ready with reason, login, logout, etc.) within a gadget embedded in the CRM GUI. It provides numerous features such as screen pop, click-to-dial, record sharing, activity histories, note taking in gadget, the ability to associate a CRM record with the call, real time displays, and custom toolbars. In many contact centers, agents spend most of their day inside of the CRM; these centers typically prefer a solution that allows agents to interact with customers without leaving the CRM GUI. Placing interaction control and status tools inside of the CRM maximizes the level of CRM integration possible. b+s Connects uses Finesse Services as the API to enable communication between the Cisco Contact Center and the CRM, but does not use the Finesse GUI. Since the b+s Connects gadget is embedded in the CRM it is particularly well-suited to contact center environments in which the agent spends most of his time in the CRM.



b+s Connects for Salesforce - CCE Edition

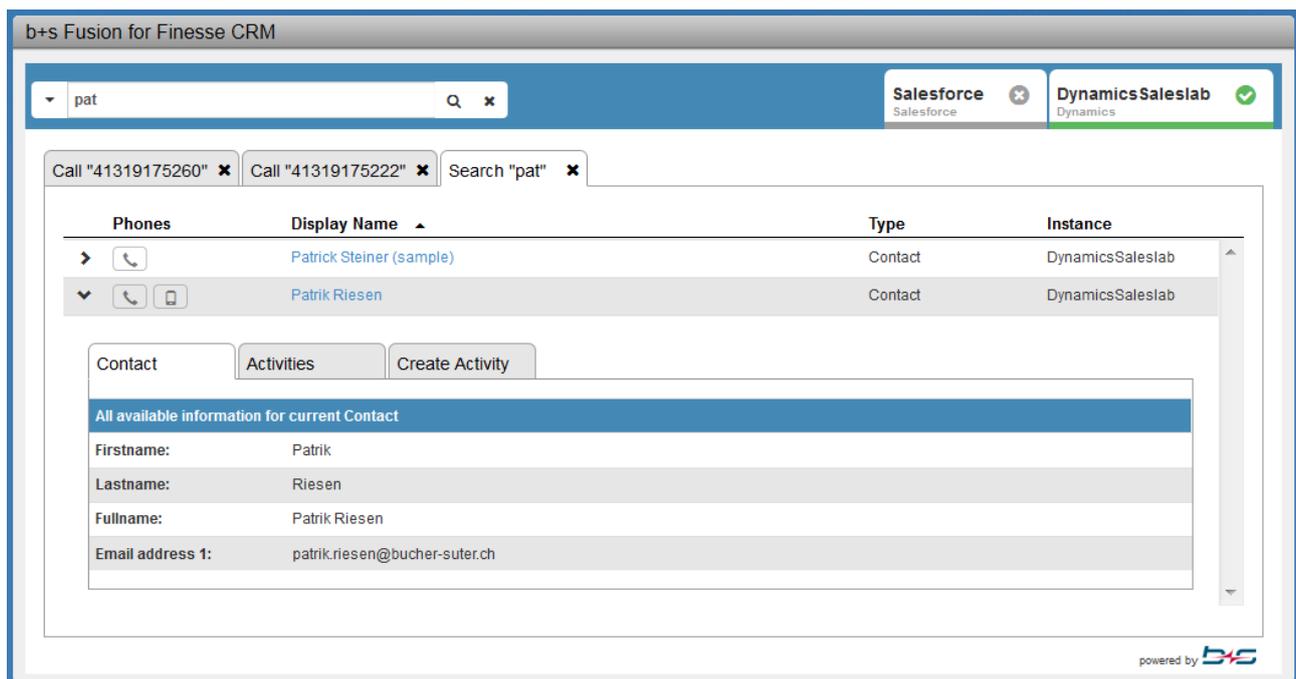
## b+s Fusion for Finesse CRM

b+s Fusion for Finesse CRM takes the opposite approach. It gives agents access to essential CRM information within a Finesse tab. When an incoming phone call arrives, the software will automatically displays a link to the customer’s CRM record inside of the Finesse environment. If an agent viewing this link needs to see more details, they can click the link to display the full record in the CRM. The agent can see as much or as little information about the customer as the contact center admin chooses to display in the “Contact” tab. They can also see a history of customer interactions in the “Activities” tab and can create new activities without leaving the Finesse GUI. Furthermore, since agents can see the customer’s journey and communication history, they know

when the customer called, who they spoke to, and their preferred communication channel.

b+s Fusion pulls this information from the CRM and displays it in Finesse. b+s Fusion CRM also makes it easy for agents to contact customers using the click-to-dial feature. Notice the screen shot example below showing an integration to Microsoft Dynamics CRM.

The Fusion approach gives the agent access to the Cisco, b+s and 3rd party gadgets in a single application. It works well for contact centers which need to integrate multiple CRM/3rd party applications into the contact center. Cisco Finesse acts as integration hub between Cisco CCE and these applications to optimize the agent experience.



b+s Fusion for Finesse CRM

## Conclusion

For contact centers in which agents utilize multiple CRM/3rd party applications and spend most of their time in Finesse, integration via the Finesse GUI likely makes the most sense. This type of integration works well for contact centers with less focus on the CRM and less need for advanced features.

Alternatively, when a “single pane of glass” focusing on the CRM and a wider array of features are the priorities, having controls embedded in the CRM is the preferred option.

Instead of buying a pre-integrated, off-the-shelf connector, contact centers can build their own integrations or hire consultants to do so. The up-side here is that the developers can customize the integration to look and behave exactly to company specification. The downside is that these custom developed integrations tend to be time consuming (sometimes taking years to complete), expensive, and risky since they require a deep level of

Cisco and CRM expertise. Maintenance costs and effort is always an issue since maintaining compatibility between new versions of the browsers, OS, Cisco Contact Center, and the CRM requires constant vigilance and access to early releases of each software component involved.

In summary, out-of-the-box, pre-integrated Cisco/CRM connectors are a quick and easy way to enable deep contact center/CRM integration with minimal effort and cost.

## About Bucher + Suter

Bucher + Suter is a Preferred Solution Partner and Advanced Technology Partner delivering 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.

