White Paper
CRM Connectors

Contents

CRM Connectors

Introduction

This white paper outlines the benefits and value proposition associated with integrating the Cisco Contact Center with Customer Relationship Management (CRM) software.

If you're reading this whitepaper it is likely that you're interested in better understanding the challenges companies face in relation to their customer service strategies and the technologies associated with addressing those challenges. Regardless of technical or business perspective, agent productivity is one of the most important Key Performance Indicators (KPI) for measuring overall contact center efficiency. That is why it is surprising that companies often overlook the impact of CRM tools on contact center efficiency; in much the same way that optimizing an airplane's cockpit layout, or fine tuning a race car's aerodynamic shape, making subtle but important tweaks can vastly improve performance.

«Technology is not just changing how we communicate, it is changing how we prefer to communicate.»

In many ways, customer profile data is at the heart of reaching productivity goals. Contact centers can use CRM data to ensure customers are connected with agents possessing the knowledge and experience to resolve their specific problems. Once connected, the agent requires access to detailed contact histories in order to be most effective in addressing customer needs. Because agents are at the center of all contact center interactions, making their work simpler, and giving them a more intuitive operating environment will decrease Average Handle Time (AHT), first contact resolution, and overall customer satisfaction.

While on one hand, recognizing how important agent efficiency is, being aware of customer communication channel preferences is also extremely important; if certain customers prefer to transact communication in specific modalities, then businesses need to be receptive to those preferences. This kind of responsiveness is not simply a matter of catering to customers' taste. It is a way of allowing customers to interact with businesses in the ways that are most comfortable and convenient for them. Whether your goal is to deliver excellent customer service, increase sales, or reduce costs, an omnichannel strategy is critical to delivering customer interaction consistency. The question is no longer whether or not to provide multiple interaction channels, but how.

The next important customer service parameter to consider is that of obtaining a 360-degree view of each and every customer. Implementing strategies that enable agents to a obtain full contact history, purchasing history, service history, and personal profile data will have a dramatic effect on organizational efficiency as well as customer satisfaction. A CRM integration designed to augment the CRM helps the contact center helps achieve this view by providing customer interaction data from the routing system. With this data, supervisors and agents have instantaneous access to the customer's full contact history as well as the range of interaction types they have used, all in one place: the CRM.

CRM Connectors

To be truly customer-focused, contact center managers and administrators need to think strategically about how their contact centers interact with customers. Today, this is defined largely by the technology solutions they decide to implement. And, in a competitive market, wherein differentiating products and services is increasingly difficult, high-quality customer service that solidifies brand loyalty is all the more important; businesses simply cannot afford to hemorrhage customers because they choose to implement solutions that fail to provide agents with each of the three factors highlighted:

- Quick access to customer profile data
- Identifying customer communication channel preference
- Obtaining a 360-degree view customer journey

Businesses must adapt to customer needs, take cues from customer preferences, and deliver the variety of interaction channels that today's text- and email-focused customers seek.

Three perspectives about why businesses should integrate?

From a business perspective, the simple answer is, simultaneously, to reduce costs and to improve customer service. Cost reduction efforts are often focused on "labor savings" through minimizing the time agents spend on phone calls, without jeopardizing superior customer service. The goal is to be able to handle the same workload with fewer agents by repurposing agents to handle blended work.

From a human interaction perspective, the answer is to drive functional efficiency at the minute-to-minute interaction level. This can be done by giving agents a Graphical User Interface (GUI) environment which maximizes the chance of a fast and successful interaction.

From an operational perspective, integrating CTI and CRM software can reduce the number of applications being introduced to the environment, which in turn extracts more from existing investments, and in some cases, reduces recurring IT expenses.

Five key areas of functionality can be improved through CRM integration:

- A unified, multichannel contact center streamlines customer journey by providing a range of possible contact channels, and a consistent experience across all of those channels (e.g. voice, email, chat, Social Media, etc.).

- CRM screen pops, screen pops on transfer, and agent-to-agent screen sharing eliminate the need for customers to provide identifying information to agents (for at least the second time), while they wait for those agents manually to look up their CRM records.

- Functional enhancement features within the CRM such as click-to-dial, customer interaction history access, real-time displays, and call recording buttons to simplify the agent experience.

- Intelligent routing taps into CRM data, directing customers to agents who have the optimal skills and knowledge to address issues quickly and efficiently.

- A "single pane of glass" approach eliminates fumbling between applications, thereby providing agents with access to necessary tools AND information in a single GUI.

Let's go into greater detail about each of these functional areas.

CRM Connectors

«In a competitive market, high quality customer service that solidifies brand loyalty is all important.»

Unified multichannel contact center

Integrating the contact center technology with a CRM's omnichannel capabilities opens up a range of communication channels. The benefits of making these modes of communicating available to customers are more than meet the eye. Technology is not just changing how we communicate, it is changing how we prefer to communicate. Increasingly, customers want to connect with businesses in ways that are convenient to them. That might mean a phone call on the way to work. But it also might mean a chat while in a meeting, or a text message when they're on the train. Businesses need to modify how they receive customers, because providing a superior customer journey is often what distinguishes one company from another in a competitive market space. However, rather than entailing an additional service burden to companies, making omnichannel communication available actually has a distinct upside for businesses as well—provided they are able to implement technology solutions that allow them to make such services available in a quick and cost-effective way. The advantage for businesses is that offering omnichannel services may actually decrease operating costs. Blended agents are individuals capable of fielding a range of customer communications: chat, email, and voice, for example.

This means that instead of just answering the phone, or just writing emails, blended agents can be doing all of these things as once: multiple chats with emails, all at once. The operational efficiency that comes with this sort of customer contact response system is a distinct improvement on the old, one caller-one agent setup. More efficient agents means fewer agents, which in turn means lower operating costs for the call center. Ultimately, there are only upsides to omnichannel communication, again, if the correct technology has been implemented.

«The operational efficiency that comes with this sort of customer contact response system is a distinct improvement on the old, one caller-one agent setup.»

The range of use cases are many: consider a technician capable of invoking a web chat, a doctor sending an email in between patients, or a student requesting help via Social Media rather than calling into the contact center. Let's focus on the chat and email communication channels.

CRM Connectors

By offering customers a variety of communication channels (e.g. voice, email, chat, Social Media, etc.) while also utilizing integrated contact center tools, businesses can enhance the customer journey, reduce operating costs, and take better advantage of sales opportunities.

Specifically, integrating CRM chat capabilities into the contact center routing platform can decrease costs and increase sales revenue. By allowing agents to handle multiple chats simultaneously, the contact center will require fewer agents to handle the same number of interactions, resulting in labor savings. Giving agents the ability to handle text chats during lulls in voice traffic means that agents can be productive during periods in which they would normally be idle, further decreasing labor costs. Furthermore, offering text chatting as a communication option decreases telephone call volume, as customers can resolve their requests and questions online. This reduction in call volume frees further agents from phone calls, and even potentially allows companies to work with fewer representatives and increases savings by reducing number of employees. Finally, making it possible for customers to pose questions quickly and easily to agents via chat can reduce their uncertainty during things like Internet sales, thereby reducing shopping cart abandonment. An added bonus to the opportunity to establish customer interactions in these scenarios is that during such chat sessions, agents can suggest additional products to otherwise uncertain customers; buyer psychology indicates that a consumer on the fence about whether to make certain purchases is more likely to make those purchases if they receive reassurance about the transaction from a customer representative reiterating that the purchase opportunity is as the customer imagines, or better. The net effect: increased average cart size.

Providing customers options, such as sending an email instead of calling in, enables them to use the channel that makes the most sense to them based on their current situation. Customer emails often get ignored, fall through the cracks and, or responses takes inordinately long to send. If a customer's email is ignored they typically call into the contact center, which increases costs and irritates customers. By integrating CRM-based email into the contact center platform, it is possible to leverage the contact center's skills-based routing engines, which will result in more timely email responses. Features built into the CRM, such as suggested response templates, will increase email response accuracy, thus reducing customer follow up email or phone calls.

Screen pops

In contact centers without CRM integration, customers are often asked to enter an identifier such as an account number into an IVR only to then repeat the identifier when connected with an agent, which the agent must then search for in the CRM. Not only is this frustrating for the customer, but it is also a waste of time for both the customer and the agent. By avoiding having to ask customer again for an identifier and search for the correct record, contact centers can shorten the time agents spend on phone calls, which, in turn, lowers labor costs.

Multichannel (email, chat, Social Media, etc.) screen pops provide a compelling ROI in the form of labor savings but, unlike voice screen pops, do not reduce network costs.

Sometimes, agents must transfer customer phone calls, emails, or chat sessions to coworkers with skills or knowledge more relevant to those queries. By integrating the CRM with the contact center platform, the

CRM Connectors

second agent can see the exact same customer information as the first agent via screen pop and, or agent-to-agent screen sharing. In this way, the second agent will not have to ask the customer yet again for their identifying information and call reason.

Advanced CRM Functionality

Contact center platforms capture a wide variety of data. For example, at what time an interaction arrived, who answered it, the customer identifier, call or task duration, wrap up reason, and so forth. Integrations that pass these data to the CRM's "Interaction History" provide supervisors and agents with valuable insights into each and every interaction regardless of channel.

Telephony-enabling customer phone numbers inside the CRM, so that they can be interacted with directly, is a very important money saving feature of CRM, contact center platform integration. Instead wasting valuable time manually typing a phone number into their phone or softphone—and potentially misdialing it—agents can make outbound calls with a single mouse click. In a contact centers with high outbound calling volumes, saving even 5 – 10 seconds per call will result in a significant cost reduction.

Intelligent routing

Basic skills-based routing is set up in order to connect customers directly to specific agent groups, identified by menus selections customers made within the IVR interface. However, skills-based routing does not normally take additional data stored in the CRM Database into account when making routing decisions. However, CRM-based data combined with data captured in the IVR helps companies capture the context of an Interaction far more effectively.

Thus, this combined approach is able to identify such thing as the customer's reason for calling and their prior contact history. Then, based on this information, the routing engine can make even more effective choices about which agent skills are most relevant to that transaction. Here again, doing a better job of matching customers to agents will reduce handle times and improve resolution rates.

Single pane of glass

In a typical contact center, agents juggle multiple GUIs during an interaction in order to address customer questions and requests. Contact centers that provide their agents with access to all of this data in a "single pane of glass" simplify the agent work process. Because it is no longer necessary to query multiple systems, the clear result of providing this sort of seamless access to CRM data through a single GUI is increased productivity. In this way, agents can immediately jump to the "how may I help you" stage of the conversation, which generates a positive customer perception. Customers increasingly expect a smooth and efficient journey with the companies they engage. For this reason, ensuring that customers experience that businesses value their time and loyalty should no longer be understood as "staying ahead of competition" — today it is a customer service requirement.

The Bucher + Suter approach:
b+s CRM connectors

b+s CRM connectors provide out-of-the-box 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, upgrade, and maintain than a custom built or homegrown integration. What is more, b+s connector customers can,

CRM Connectors

and should take advantage of frequent, new features releases without having to worry about ensuring compatibility with the latest versions of connected systems (such as the Microsoft OS, the Cisco Contact Center, and the CRM).

«CRM-based data combined with data captured in the IVR helps companies capture the context of an Interaction far more effectively.»

Agents are able to handle customer interactions more effectively because they are not required to switch between applications. As well, they can take advantage of features such as screen pops, click-to-dial, call logging, and sharing records with other agents.

There are a variety of 3rd party chat and email management software programs on the market today. However, many lack the ability to integrate into the Cisco Contact Center. These products have their own routing engines, agent GUIs and reporting tools. This means that agents can either handle telephone calls or multimedia interactions, but not both simultaneously. This is the result of a lack of integration between the Cisco voice routing brain and the 3rd party chat/email routing brain. Being forced to use separate GUIs and separate reports for different media types is highly inefficient. Instead, b+s

CRM connectors enable the Cisco Contact Center to function as the single routing engine for all interaction types provided by the CRM system. These connectors enable both a unified multichannel queue and unified multichannel reporting — key goals that many contact centers desire but have yet to implement.

Key b+s connector features

- Single pane of glass: Cisco Contact Center customers can use b+s connectors to transform their CRM into a multichannel cockpit capable of supporting both calls and multimedia interactions in a single application

- Agent state and interaction control inside of the CRM

- Multichannel screen pop, screen pop on transfer, and record sharing

- Click-to-dial phone numbers in the CRM and click-to-dial via a phone directory

- Ease-of-use and installation: pre-integrated CRM connectors reduce implementation costs, project time lines, and agent training

- Cisco Outbound Option support: administrators can export customer data from the CRM to the dialer and agents can participate in preview & predictive dialing campaigns from inside the CRM GUI

- Ability to populate CRM interaction histories with data from the Cisco Contact Center such as ANI, DNIS, date, time, duration, call type, and wrap up reason. Agents and supervisors can access the CRM to see what happened on every interaction regardless of media type

CRM Connectors

Conclusion

Enabling CRM based, multi-channel interactions in a contact center helps reduce labor costs since a multi-channel agent 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. By integrating CRM multichannel technology to the Cisco contact center, companies can improve customer satisfaction by collaborating with customers using the communication method most convenient for them. Intelligent routing based on both contact center and CRM data helps ensure that interactions are routed to the agent best able to handle them.

Bucher + Suter provides pre-integrated connectors that make it easy for contact centers to take advantage of the functionality and benefits described in this white paper. 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. Barriers to CRM integration have fallen and companies can now unify their contact center technology with unprecedented ease.

About Bucher + Suter

Bucher + Suter is a registered Cisco Developer Network and Preferred Solution Partner delivering integrated, multi-channel solutions for the Cisco Contact Center that enabling customers to realize additional business value from their Cisco investments. Bucher + Suter has been helping customers implement strategic solutions and achieve their goals for over 30 years.

09