

THE VALUE OF ADDING VOICE TO SALESFORCE

TRANSFORM SALESFORCE INTO A COMPLETE CONTACT CENTER SOLUTION



Many companies are moving to a cloud-hosted Customer Relationship Management system to take advantage of the cloud's many benefits including anytime, anywhere access from any device and the Salesforce Sales and Service Clouds are emerging as the clear leaders. While countless companies have made Salesforce the database

of record for most all customer data, many with existing contact centers are still maintaining separate ACD, IVR and Call Recording systems, each with their own databases containing valuable customer interaction data.

This separation of CRM and voice-related contact center systems creates challenges and opportunities for improvement in the areas of:

- Agent, Administrator, and Manager Productivity and Efficiency
- Visibility into Contact Center and Agent Real-time Performance and Performance Trends
- Customer Experience and Business Results via Analytics

This whitepaper explores these challenges for the modern contact center and the advantages of integrating the ACD, IVR and Call Recording functionality into the Salesforce Sales and ServiceClouds.

Challenges of the Modern Call Center

When the Salesforce CRM application and IVR, ACD and Call Recording systems operate as separate contact center entities, it impacts agents, administrators, managers and the business's visibility into the contact center's overall performance.

Reduced Agent Productivity and Efficiency

In this bifurcated environment, agents have to work in two environments and have two user experiences in the course of servicing customers. To start their day, the agents must login to the CRM to access customer data, purchases, and case histories and the ACD to be available to receive calls. As calls come in, they must manually search for the customer information in the CRM and correlate the telephone caller with the salesforce record they find. How many times have contact center

callers been asked to "be patient while I bring your record up"?

Then, once the call is complete, the agent must duplicate efforts manually entering wrap-up codes into the ACD and in the CRM so the call status and the agent's work are properly recorded. In the contact center, where efficiency is a top priority, this seems counter to the center's objectives.

Reduced Contact Center Administrator Productivity and Efficiency

By the same token, the contact center administrator is similarly hindered with two environments for administering the contact center. They must set up agents as users in both Salesforce and the ACD, including any roles, permissions, or skills. Managers must be set up in Salesforce and the IVR, ACD and Call Recording systems. They set up toll-free numbers, queues and initial routing in the ACD, and set up the CRM to collect customer data. Call wrap-up codes are often redundantly defined and maintained in both systems.

While Salesforce has the customer data, case data and qualitative data about performance, the administrator must define call routing rules, such as customer and agent prioritization separately in the ACD. They are not able to easily use any of the rich information in the CRM to drive ACD behavior and decision-making. When things change, they have two systems with two User Interfaces to deal with.

Reduced Contact Center Manager Productivity and Efficiency

With two environments to work in, the contact center manager's ability to manage and monitor the performance of agents and the overall contact center in real-time is impaired. The manager must jump between two applications to get a complete picture of everything that is going on in the contact center.

The ACD provides the quantitative information such as call volumes, size of queues, wait times, speed of answer, length of calls and wrap-up codes. But the CRM has the qualitative data about the number of sales being made, if there are issues such as service outages or product malfunctions, and whether or not issues are being resolved during the first calls. This makes it very difficult for the manager to make split-second decisions to manage the dynamic environment of today's contact center in the course of a day.

Two Environments for Contact Center Performance Reporting

With separate ACD, IVR and CRM systems, each with their own databases and reporting, contact center management is then required to pull data and reports from multiple systems and manually correlate the data to get a complete picture of contact center and agent performance.

Again the qualitative information about the customer, their issues, history, importance and value is in the CRM. Some agent performance

information is also in the CRM, such as the value of sales made, upselling successes, and how well support issues were resolved. But the quantitative data about the length of the call, customer wait time or if they had to be transferred to multiple agents is in the ACD and the path the customer took to connect with the agent is in the IVR.

This makes it very difficult to make two important correlations; mapping customer characteristics to sales successes or support issues, and determining the true cost of agents successfully selling and servicing customers. With these multiple applications separate, the "Business Performance" of the contact center is hard to assess.

Get Full Value from your Salesforce Investment

One of the many great things about the Salesforce Sales and Service Clouds is their ability to be customized. The Salesforce open architecture allows the UI, functionality and database to adapt to the needs of the clients. Almost all Salesforce customers make sure the fields and values they need are set up in the UI and database. But great benefits are to be had for those that go one step further and integrate their applications into Salesforce, especially contact centers with their ACD and IVRs.

The next page discusses the many benefits a contact center can achieve by integrating an ACD and IVR into the Salesforce application.

Figure 1.
The Six Strategic Benefits From Unifying Call Management and Salesforce

Get Full Value from your Salesforce Investment
Increased Agent Productivity and Effectiveness
Increased Contact Center Administrator Control and Efficiency
Increased Contact Center Manager Control, Productivity and Effectiveness
Unified Visibility into Contact Center’s Strategic Business Contribution
Optimization of Contact Center Performance

- **Increased Agent Productivity and Effectiveness** – by giving the agents one environment in which to work with seamless integration of functionality and automatic access to all customer, IVR and ACD data.
- **Increased Contact Center Administrator Control and Efficiency** – by providing a unified environment in which to set up the ACD, IVR, Call Recording and CRM for the contact center.
- **Increased Contact Center Manager Control, Productivity, and Effectiveness** – by providing a unified environment for real-time monitoring and management of agent and contact center performance.
- **Unified Visibility into Contact Center’s Strategic Business Contribution** – by integrating the data from the IVR and ACD into the Salesforce database, for a comprehensive view of the qualitative and quantitative factors that drive positive customer interactions and the desired business outcomes.
- **Optimization of Contact Center Performance** – by giving the ACD and IVR access to the CRM’s customer demographic

and interaction data, the IVR’s behavior and the ACD’s routing can be optimized in real-time to increase positive business outcomes.

The Solution

Increased Agent Productivity and Effectiveness

By integrating the ACD, IVR and Call Recording into the Salesforce application, the agents have a single environment to sign on to everyday, be trained on, monitor and keep updated in the course of their day. This allows them to take a “customer view” of their interactions, as opposed to taking an “application view”.

When a call gets routed to the agent, the ACD is able to generate a screen-pop, rich with customer data. It can display the IVR selections the customer made to reach the agent, but also all the CRM data such as the last open case, past interactions, issues and product interests. This efficiently arms the agent with all the data they need to intelligently meet the customer’s needs and maximize the interaction for the desired business outcome, as well as reducing the call duration.

As they go about their work day, the agent can be far more productive, working within the single Salesforce environment with call controls

and click-to-call functionality. ACD call data can be automatically logged into the CRM so the agent does not have to enter it manually. Call recordings of the prior customer conversations can be available directly in the CRM in case there is a dispute over what the customer was previously told.

Increased Contact Center Administrator Control and Efficiency

With a single system, contact center administrators can set up the contact center operations all within the Salesforce CRM. To set up agents, they access the CRM users, their predefined roles and responsibilities and simply designate them as contact center agents available to take calls and aligning them with teams and sites - same with managers. Call center sites, programs, toll-free numbers and queues can all be defined within Salesforce. This gives the administrators a single, efficient environment in which to set up and maintain the IVR, ACD, Call Recording, CRM and voice, email, chat and social channels.

Increased Contact Center Manager Control, Productivity and Effectiveness

With an integrated ACD, IVR and CRM environment contact center managers can efficiently drive the performance of the contact center in real-time. They can monitor call volumes and agent performance, and adjust call center operations accordingly.

With the data and functionality all in one system, the contact center manager can view integrated dashboards that display all calls in queue, calls

Figure 2.
A Unified Contact Center

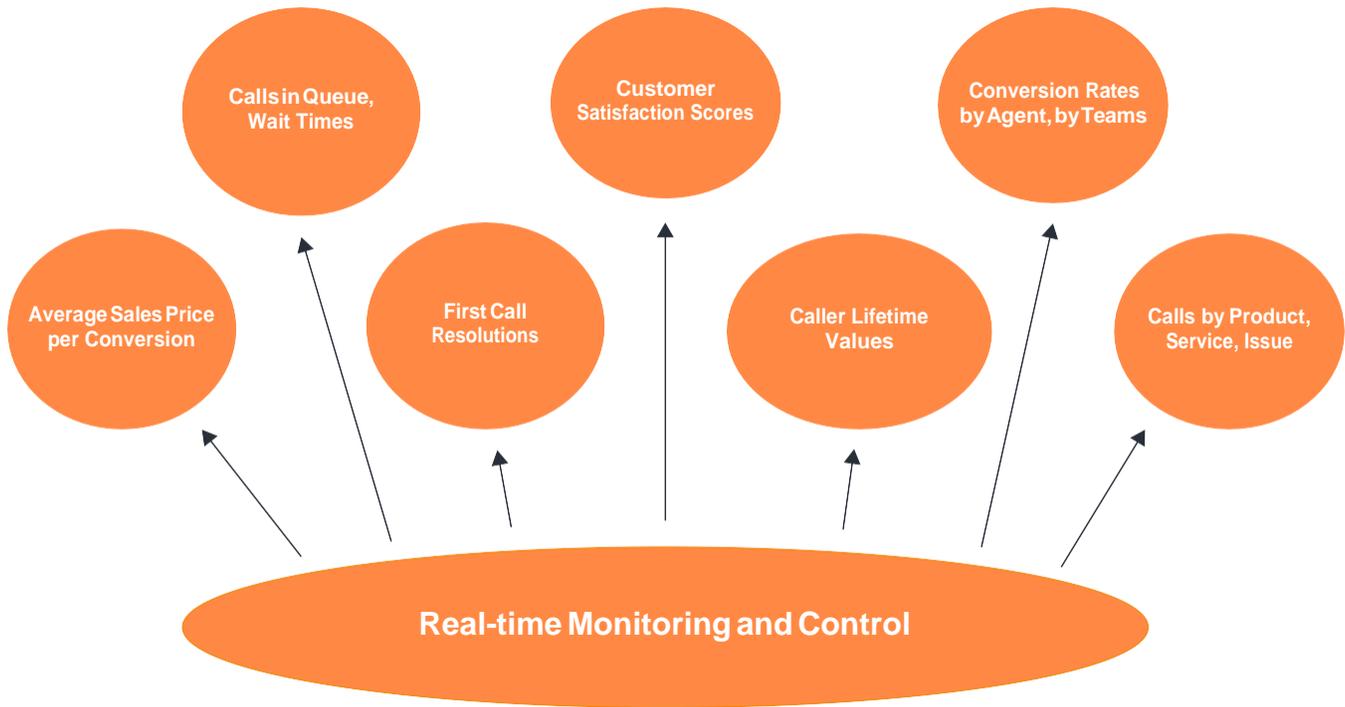


in progress, number of calls by sites, teams and agents. With this unified view, they can make real-time decisions to change IVR options, reroute calls or balance loads based on what is going on in the contact center at that moment.

These decisions are no longer limited to the quantitative data in the ACD, because the qualitative CRM data regarding which products and services the calls are about, service issues, first call resolution rates, call quality, real-time sales figures, conversion rates and dollar values, and which agents and teams are "hot" and which are not are at the managers' fingertips in the same system.

Managers can also listen-in to calls in real-time or review call recordings within Salesforce while viewing the customer and cases records in Salesforce for a complete picture of that call, it's quality and the agent's performance. This provides the manager with all they need to know when additional training or coaching on-the-fly are required to maintain performance and service levels for that day.

Figure 3.
Cross-system Key Performance Indicators



Unified Visibility into Contact Center’s Strategic Business Contribution

Now that the Salesforce database is the database of record for the ACD and IVR data, in addition to the traditional CRM data, unified reports using the Salesforce Reporting and Analytics tools can be generated that map the qualitative and quantitative customer interaction data for a new level of understanding of the performance of the contact center, its sites and agents.

Integrated reports can be generated that include data from the IVR records, ACD call and agent records and the Salesforce contact, case and account records. These reports can correlate the nature of the cases, how well cases were or were not solved, sales and upsell results by agents or groups of agents, lengths of calls,

IVR paths and customer demographics. This provides contact center management insight into important trends and patterns that extend beyond efficiency and into quality, business performance and the achievement of positive business outcomes such as first call resolutions, sales, upsells and customer satisfaction

Optimization of Contact Center Performance

All of this visibility, insight, and correlation between IVR, ACD and CRM data can be used to not only manage the contact center, but also to drive the behavior of the IVR and ACD call routing to optimize contact center business performance. This can obviously be done manually by the manager or administrator once they review the reports and dashboards, but it can also be automated.

Figure 4.
Contact Center Performance Optimization Strategies



With the data integrated, the ACD can query the customer, account, case, sales and agent performance data in the CRM and use analytics to make routing decisions to drive the best business outcome. For example,

- **Performance-based routing** – matching customers with the agents with the best success records resolving particular issues or converting a call to a sale or upsell
- **Demographic routing** - identifying the agents best able to service customers based on a mutual affinity
- **Customer status routing** - intelligently routing customers to certain agents based on their stage of customer journey, delinquency, etc.
- **Value-based routing** – prioritizing customers with higher propensity to buy or lifetime value and connecting them to specially-skilled agents

About BroadSoft:

BroadSoft is the leading provider of cloud software and services that enable mobile, fixed-line and cable service providers to offer Unified Communications over their Internet Protocol networks. The Company's core communications platform enables the delivery of a range of enterprise and consumer calling, messaging and collaboration communication services, including private branch exchanges, video calling, text messaging and converged mobile and fixed-line services.

This optimization created by leveraging CRM, IVR and ACD data together to drive call center operations can increase sales, upsells, first call resolutions, customer satisfaction, and other positive business outcomes.

SUMMARY

The Salesforce Sales and Service Cloud are delivering significant improvements of productivity, effectiveness, and performance for companies. By taking advantage of the Salesforce open architecture and its extendable database to integrate modern ACDs and IVRs into the Salesforce environment, contact centers can provide contact center agents, administrators and managers with new levels of efficiency, productivity, control, quality, and performance.

With the addition of the state-of-the-art Salesforce reporting and analytics, contact center performance can be managed beyond efficiency and towards optimum business performance, making the contact center the strategic asset and contributor it strives to be.

About PeachComm:

Founded in 2001, PeachComm provides Business Communications Services to Customers in over 200 cities in the Southeastern United States. PeachComm has been a BroadSoft partner since 2006. In addition to offering the latest technology of cloud based communications, PeachComm has agreements with 99% of all Internet Service Providers to offer a full suite of business grade Internet services to ensure its customer's cloud based services are functioning at full capacity.