Everything You Need to Know About Contact Centre Systems Integration

An integrated CRM in the contact centre forms the bedrock of effortless customer interaction for any organisation.

geomant™

About Geomant

We make customer interactions effortless.

Geomant is a well-established, innovative Systems Integrator and Software Developer, specialising in delivering amazing customer interactions. We provide tailored solutions based on our unique portfolio of cloud and software technology.

www.linkedin.com/company/geomant/

www.geomant.com

geomant™

Contents

Introduction

An integrated CRM in the contact centre forms the bedrock of effortless customer interaction for any organisation. In a world where customer experience has become a key differentiator, here's everything you need to know about CRM and telephony systems integration and the benefits it can deliver your business.
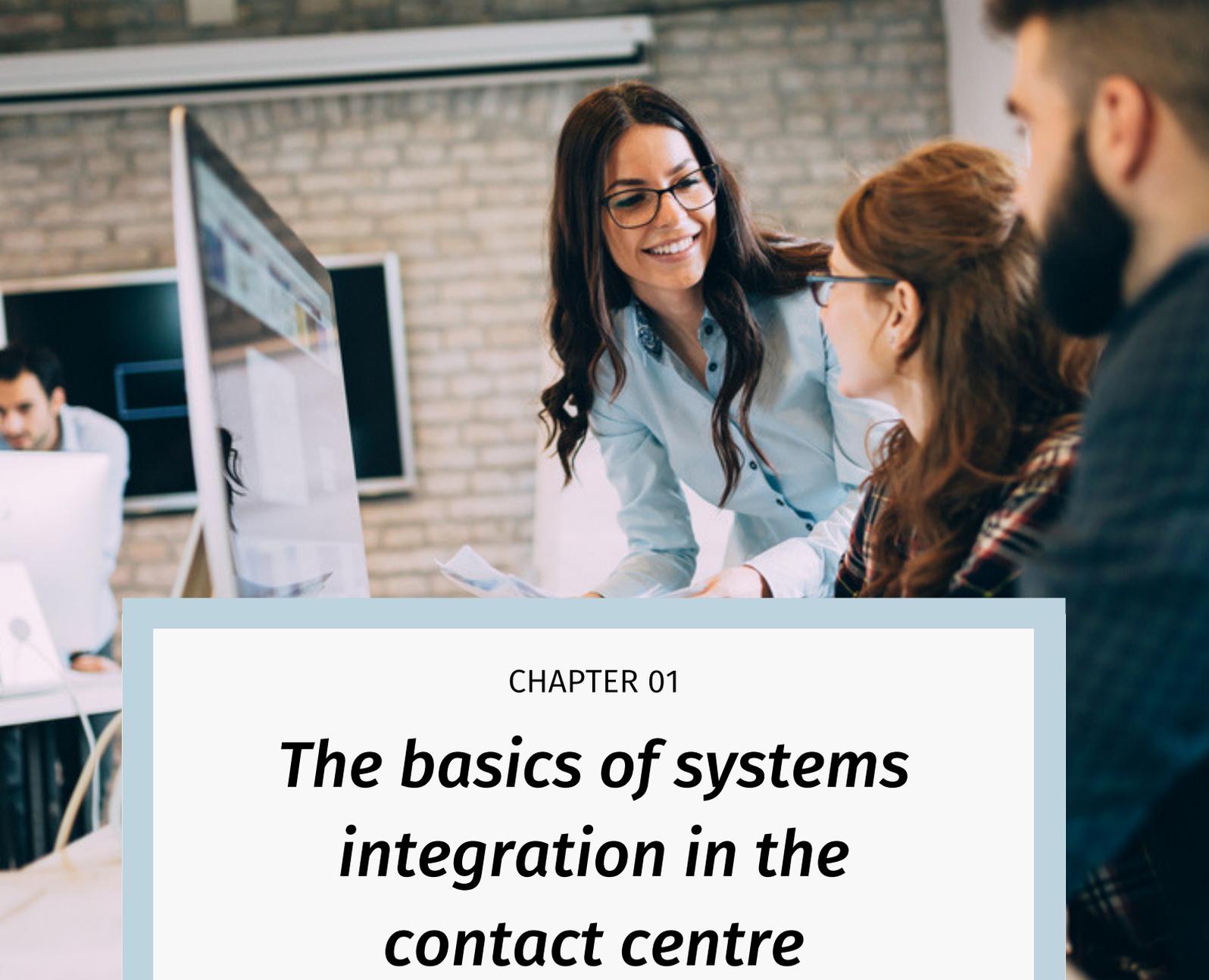
CHAPTER 01

The basics of systems integration in the contact centre

Let's jump straight in and look at the basics of systems integration

What is contact centre systems integration?

A CRM (customer relationship management) system is a central database where businesses store and track the contact information and interaction history of their customers and prospects. A telephony system allows contact centres and customer service teams to manage and direct all volumes of inbound or outbound voice communication, keeping agents productive and able to serve customers quickly and effectively. Marry up the two with a contact centre integration solution and your organisation can expect to benefit from the following tools and features:

- A unified agent desktop - one interface where all the key information is clearly presented.

- Soft phone embedded in the CRM application so that agents can make VoIP calls directly from the desktop.

- A consolidated view of omnichannel activity and history that's easy to read and make sense of.

Links to the relevant call records if an agent needs to take a deeper dive into the interaction history.

An instant screen pop that means key customer data is delivered to the agent with the call, from the very moment it starts.

Click-to-dial capability means agents simply click on the phone number listed in the CRM to make a call.

Agent set callback - agents can schedule a callback to a customer or prospect from one interface.

Call transfers with context so that if a call needs to be handed off to another agent or manager they are transferred with full customer details.

Consolidated reporting for at-a-glance management.

Agent-specific reporting for drilling down on the statistics.

Call recording so calls can be conveniently accessed and played back directly from a link within the CRM system.

geomant™

CHAPTER 02

Is there a perfect balance between being customer-centric and profitable?

In a world where profit margins don't exist, offering consistently exceptional customer service in the contact centre would be relatively easy. Lots of available agents would mean that they are able to answer calls quickly and have the time to resolve queries to the customer's satisfaction. The reality is that the perfect balance is hard to set because too many agents means a higher spend, and that's not efficient for businesses who naturally need to keep a close eye on the profit margin and demonstrate ROI.

Have too few agents available, and the costs are lower but the customer service offered will be poorer. It means more time that the customer will be stuck waiting in a queue for their call to be answered and the agents, seeing that big queue, could become anxious to finish a call and move onto the next.

The right integration technology means agents are immediately furnished with key information when they connect with a caller, so they can get to the heart of an issue or query straight away and deal with it quickly. It's a win-win situation with happier customers and contact centre agents who are able to move on to the next call more quickly.

Using an Avaya telephony solution? Find out why you should integrate Avaya with your CRM to deliver a quicker, more personalised customer service.

LEARN MORE

Looking outside of CRM and telephony integration, you'll also find many other tools that can be integrated with the contact centre to help with customer service while maintaining a healthy profit margin. Integrating an in-queue callback system for instance can give customers the option of receiving a callback instead of waiting in a contact centre queue, it's a cost effective way of maintaining healthy service levels. Other options like deploying AI and bots are also available and can help, read our guide to omnichannel customer service to find out more.

CHAPTER 03

How contact centre systems integration boosts agent productivity

Let's take a closer look at why integration between your CRM and a communication system, such as Avaya Telephony, is beneficial for both improving the customer experience and boosting agent productivity.

The call is answered

If we think about a typical inbound call to a contact centre, the agent will answer the call and then ask for the customers' name or account reference before searching the CRM to start the process of finding out what they might need. With a screen pop, the customer's information will appear the moment the call is connected so that, bar confirming a caller's identity, the agent can begin resolving the call immediately. Learn more about the ROI of screen pop functionality with our blog.

The call is answered

If the agent is making an outbound call to a customer or prospect they can use the click-to-dial or softphone capabilities of integrated systems to make the call from the desktop with no need to switch screens to the telephony system.

The call is underway

The unified desktop means that in either case, the agent has all the information they need on one screen. There is no need to toggle back and forth between two different screens and a useful consolidated view of the omnichannel activity on the account will be showing too. This means if an agent needs to refer to the interaction history to help them resolve an issue, they shouldn't need to search for it.

If the call is complex or needs to be escalated

The single screen interface can also present links to relevant call records so if the agent needs to refer to information gathered at a previous time they can again do so without searching through the CRM. Agents can schedule callbacks if the customer requests this without having to change screens and if a handoff is needed to another agent all the details are transferred with the call.

We take a deeper dive into why you should be tracking customer interactions in the contact centre in this insightful blog.

CHAPTER 04

The hidden cost of poor systems integration in the contact centre

If you've decided that integrating your CRM and telephony systems is the pathway to effortless customer interaction and helps to boost the productivity of your agents you might be all set to go ahead. But is it really that simple? Whether you are linking up two existing systems together or implementing a totally new core system, then effective integration will be key to the success of your project. Poor implementation will mean that agents simply won't see the benefit of a contact centre systems integration and it could even impair their productivity.
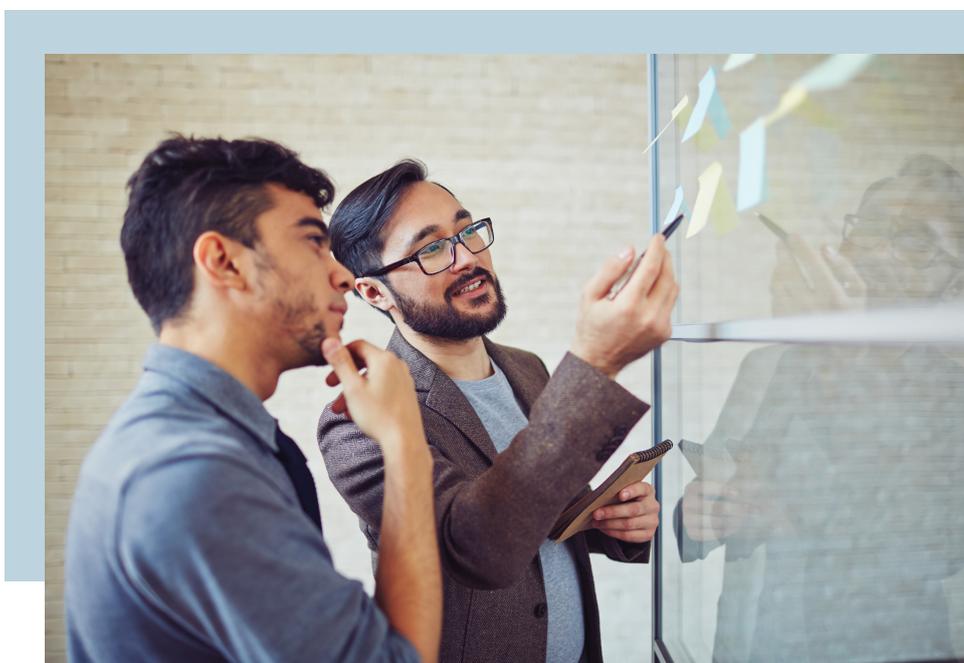
Custom Solutions to Improve the Customer Experience

At Geomant we can help you:

- Remove complexity
- Shrink delivery times
- Drive business benefit

LEARN MORE

CHAPTER 05

What should I look for when selecting a solution?

If you've decided that a contact centre systems integration is for you, there are three routes available when you start looking for a solution:

1 Firstly, you can discuss your requirements with your IT department and see if they can build you a bespoke solution.

2 Or, if IT aren't keen or you don't have the expertise in house, ask a third party to build you a bespoke solution.

3 Finally, you can search for a vendor with an off-the-shelf solution.

So, from those options should you look at a bespoke or out of the box solution? Here are the pros and cons of each:

Bespoke solutions

Every business and organisation is different, and that means the requirements of their customer service teams will differ too.

Custom or bespoke developments are based around the exact user requirements of the contact centre in question and therefore will be tightly aligned to that business' needs. Custom contact centre integration solutions can enable the inclusion of key functionality that supports agents to offer great customer service and deliver other business benefits. The development cycle of a bespoke solution can naturally be a little longer than an out-the-box solution, unless the vendor is using some form of integration framework with pre-built solutions which can aid more rapid development.

It's important to address potential change control and versioning issues with custom developments.

CRM solutions are most often than not delivered from the cloud and a sudden upgrade by your CRM vendor may 'break' the contact centre systems integration or necessitate coding changes. Consideration also needs to be made around ownership of the source code as this can make moving to another vendor very difficult and costly. This blog, from a contact centre software developer, offers a personal perspective on the subject of custom development.

Out of the box

Out of the box solutions eradicate many of these concerns as they are often provisioned as software licensing either on-premises or in the cloud. That means that they are quick to deploy and are mature offerings. In many cases, the vendors offering these solutions are part of the CRM vendor's ecosystem and have visibility of the overall product roadmap, which means

that compatibility with new versions is not an issue. Ownership of the source code is also not an issue as, provided there is a support contract in place, the product will be licensed with a right to use.

Support contracts are often something that people give little thought to... until their contact centre software doesn't work. If you don't know where to start when you're tasked with looking for a support contract provider, this blog will help steer you in the right direction:

Read the blog.
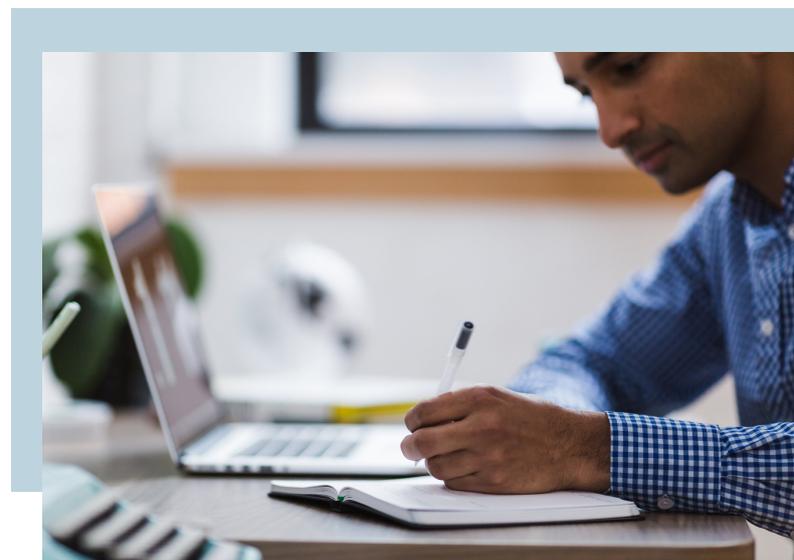
CHAPTER 06

How to utilise your investment in contact centre integration

We've covered in detail how integrating contact centre systems can improve agent productivity and help your business offer exceptional customer service, but what can you do to make sure you really utilise that all-important investment in the tech to help your business?

Combat agent stress and burnout

Stress and agent burnout are issues that cause contact centre managers a headache. Answering calls from customers who were waiting on hold and then have to wait for their information to load or hated having to repeat themselves can be very stressful for agents. Stress lowers productivity and can lead to burnout, which the 2017 Global Call Centre report contributed to 20% of staff turnout in contact centres around the world. Good technology and good management enables agents to offer the best customer service, and system integration offers both.

We've got more information about tackling contact centre agent burnout with two key tools - good software and good management.

Read the how to tackle agent burnout blog

If you're going to do something, do it well!

Make sure you implement training so that agents get to know all of the features and benefits that integration between the CRM and telephony system can offer them and the contact centre. Make sure supervisors and managers know how to effectively use all the reporting capabilities of the integration solution you implement so that they are able to access all the insight that's there.

geomant™

Learn more in our case studies

If you're interested in taking a deeper dive into contact centre systems integration, we have two insightful case studies showing how effective CRM/telephony integration helped businesses deliver exceptional customer service. Take a look:

Connecting Avaya with Microsoft Dynamics

Connecting Avaya with Salesforce

Find out more

Speak to an expert
Geomant is a specialist contact centre systems integrator with over two decades experience in integrating business applications with Avaya and Microsoft Unified Communications platforms. We work with end-users and software resellers to provide solutions that enable seamless out-the-box integration with leading CRMs including Salesforce and Microsoft Dynamics, as well as custom integrations and ongoing support.

Watch the video

If you're Interested in knowing about the benefits of integrating Microsoft Dynamics 365 with Avaya? Our 2-minute explainer video gives you all the information you need.

Watch the video

Speak to one of our experts today to find out how Geomant's trusted expertise can help transform your contact centre and upscale your customer service potential.

Contact us

www.geomant.com
products@geomant.com

Americas: +1 800 637 1077
Europe: +44 1789 387900
APAC: +61 409 99 78 39

geomant™