



The Benefits of **CTI** System Integration with Salesforce



2

INTRO

**WHAT IS CTI AND WHY
DO WE NEED IT ?**

3

4

**FUNCTIONS OFFERED
BY CTI**

**BENEFITS OF CTI SYSTEM
INTEGRATION WITH
SALESFORCE**

6

8

**HOW TO ACHIEVE CTI
SYSTEM INTEGRATION
WITH SALESFORCE ?**

INTRO

“Whenever an individual or a business decides that success has been attained, progress stops.”

- Thomas J. Watson Jr.

A successful product cannot afford to rest on its reputation, but must keep evolving to meet the changing needs of the customer. It is only by such continuous improvement and re-invention that a solution can remain relevant in current times. Such an improvement could sometimes mean big investments, but there are scenarios where organizations could make the best use of available resources and still achieve this goal.

CTI system integration with Salesforce is one such area where connecting the Salesforce CRM solution with your call center solution is an essential step forward. The beauty of this integration is that it uses the CRM data that already exists in your company's databases to help increase the effectiveness of your call centers.

WHAT IS CTI AND WHY DO WE NEED IT ?

A CTI system refers to Computer Telephony Integration or a complete set of telephony equipment, including software and hardware. In simpler terms, it has also been defined as the use of computers to manage all aspects of your phone calls. This is a required evolutionary step in call center technology of an organization.

Integrating your CTI system with your Salesforce CRM solution ensures that you make the best use of the customer data that is already available to you.

This is because it makes the CRM data accessible to your service team during customer calls, which would help you serve your customers more effectively. This whitepaper goes into the details about the functions and benefits offered by a CTI solution, to help you make an informed choice for your organization.

FUNCTIONS OFFERED BY CTI

A CTI solution can provide all the required functionalities for a call center including:

Caller Authentication: This is a basic deliverable from a CTI solution. A customer is recognized by his phone number, and the authentication leads to all the information of the customer popping up on the service agent's screen.

Call Management: A CTI could provide intelligent routing not just based on customer responses, but also taking into consideration other elements such as customer data and history. This could mean saving precious seconds in every call, as there would not be much manual re-routing by service agents necessary.

Display of Customer-related Data: The customer data would be available as screen pops to the service agent on the computer screen, which helps the service agents make intelligent responses to queries. This would include information from across interfaces, which means that complaints made by a customer on e-mail would also be easily available for reference for a service phone call.

Real-time Access: By using the data from the CRM solution, agents would be able to view the latest updates that might be relevant to the current call with the customer. Agents would have all the customer history at their fingertips, and without any time delays or server issues, contributing to processing time for queries on demand. This also means that customers would not be asked to call back due to slow synchronization of data updates across divisions.

5

Automatic Call Logging: All actions associated with a service call would be automatically logged with the record of the specific caller or customer. This replaces note taking during the call, as it just seamlessly adds to the customer history or record and is available for any future interactions.

One-click Calls: The uses of CTI in handling incoming calls are many, but it is also a good facilitator for outgoing sales and marketing calls. Many links and numbers would be enabled within Salesforce as a result of CTI integration, and actions such as calling a prospective or existing customer could be performed with a single click.

BENEFITS OF CTI SYSTEM INTEGRATION WITH SALESFORCE

If you were wondering what difference CTI system integration with Salesforce could make to your business, and why you should seriously consider it, here is a detailed look at the benefits:

Increases customer satisfaction: When a service agent responds to a customer call with the required information available to him on the screen, it can only lead to customer delight. Starting from small gestures like addressing the customer by name as soon as the phone is picked up, to using the knowledge of the customer's details including purchase history, the CTI system integration helps provide the best response to the customer. As the information is available in real-time from the CRM, all the latest activity could be taken into account before responding as well.

Improves efficiency: The number of times your customer would be put on hold during a call would soon be negligible if not non-existent! This is because there would be no need for your service agents to request for pieces of information on demand, leading to a few seconds of wait time. Saving just those few seconds on every call could lead to a significant improvement in overall productivity. At the customer end, the irritation of being put on hold and listening to repetitive music or messages multiple times during a call could be avoided. The resolving of queries and issues would also be much quicker with historical data easily accessible on the screen.



Leads to positive business impacts: While the improvements in efficiency would bring about an increase in happy customers and a resulting positive impact on business, that's not the end of it. With the required training, your service personnel could achieve some impacts in the aspect of sales as well. Since all the relevant data about the customer's interests and purchase history are already available with them, they could easily introduce cross-sells and up-sells to the customer at relevant junctures of their calls. As the customer would have a positive view of the organization with the quick resolution of his service query, this could be expected to have much better results than cold calls.

Empowering employees: Call center agents would now feel much more enabled, as every step of their interaction with the customer would be well supported by the information available in front of them. It is also more convenient and error free when an agent needs to dial a contact number, as this could be done by a single touch or click instead of entering a set of numbers. Such improvements lead to better results from service personnel in the workspace, and a facilitation of their achieving the required target numbers.

HOW TO ACHIEVE CTI SYSTEM INTEGRATION WITH SALESFORCE



Salesforce provides a call control tool known as the SoftPhone, which must be connected to a third-party CTI system to make or receive calls. Much like other solutions that have moved to being cloud-based ones, Salesforce also provides a CTI toolkit for cloud-based telephony vendors that you should consider seriously. This Open CTI solution provides an API based on the cloud that can be used by all agents.

Before the advent of Open CTI, customers had to opt for a desktop-based integration with the need for a CTI adapter application on every desktop in the system.

Needless to say, using Open CTI helps bypass many challenges of using stand-alone adapters in non-cloud systems by:

- Removing the need for adapters and plug-ins and thereby providing easy scalability due to separate installations not being required on each system.
- Saving time and effort spent on maintenance of the stand-alone adapters on various systems.
- Making your CTI system independent of specific browsers and platforms, due to its server-based functionality.

9

- Helping create SoftPhones that are customizable and therefore more integrated with your systems. For example, the SoftPhone of a salesperson would look and offer slightly different functions compared to the SoftPhone of a support representative.

The Salesforce Call Center helps to display the user data to the sales or service agent on the Salesforce side, by sourcing the information from the server where the data is based. While implementing an Open CTI solution might initially take some additional effort compared to the earlier adapter-based system, the long-term saving in effort and benefits would balance or rather outweigh this initial requirement.

A major advantage of Open CTI based CTI system integration with Salesforce is that the final solution, including the look and feel of the SoftPhone could be very specific to your needs.

It also enables interaction with other third-party applications to help provide a more enriching experience to the end-user. While some versions of the older solution would continue to be maintained by Salesforce for a while, it is definitely recommended to move to the Open CTI solution due to the benefits in the long term.

CTI Salesforce integration might pose some minor challenges for your organization including initial knowledge building and effort of setting up, bandwidth limitations in smaller organizations, and the effort in providing training to the users. None of these are a major concern, and would, in fact, be eclipsed by the advantages that such integration could provide to your business.

SUYATI TECHNOLOGIES

Suyati is a young, upwardly mobile company focused on delivering niche IT services to support myriad Digital Engagement strategies. Our expertise also includes integration and delivery of CRM, CMS and Ecommerce solutions.

www.suyati.com

services@suyati.com

Sources:

1. <http://blogs.salesforce.com/company/2012/08/open-cti-moving-cti-integrations-to-the-cloud.html>
2. <https://success.salesforce.com/ideaView?id=087300000006tu9AAA>
3. https://help.salesforce.com/apex/HTViewSolution?urlname=What-is-CTI-integration-and-how-does-it-work-1327109118167&language=en_Uhttps://success.salesforce.com/ideaView?id=087300000006tu9AAA