DRIVING REVENUE WITH
CROSS-CHANNEL
CUSTOMER INTELLIGENCE

Key Business Issues for Oracle CRM Users

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# INTEGRATED ACD AND CRM MEANS BUSINESS

Customer relationship management (CRM) has emerged as a critical piece of the digital enterprise. Today, it plays an integral role in managing everything from marketing and sales to service and support. These systems also tie into automated call distribution (ACD) systems that serve as the heart of an effective enterprise contact-management strategy. As consumers have turned to a growing array of channels and methods to communicate with companies, there's a need for far more sophisticated tools and technologies that link all these components together seamlessly and efficiently.

Consider: More than three out of four consumers say that a company's reputation for customer service is important to them when choosing to buy from a particular brand. Nearly 90% believe that a seamless multi-channel experience is essential. Depending on the individual and the circumstances, they may turn to email, web chat, social media, a self-service

portal or the telephone. Or they may switch from one tool or channel to another in an attempt to resolve a single issue. At the center of everything: 64% expect to receive real-time assistance, regardless of the channel.

To be sure, today's multi-channel approach – also referred to as omni-channel – places enormous demands on organizations to interact faster, smarter and in a more relevant way. Customers have greater control and power than ever, and they expect excellent service. Competitors are only a click away. A business that lacks a comprehensive customer service and support framework, including tight integration between an ACD and CRM, places itself at risk of leaving customers dissatisfied, seeing its brand tarnished and watching revenues erode. The right strategy and technology can mitigate these risks.

Nearly **90%** of customers believe that a seamless multi-channel experience is essential. @VoltDeltaNews

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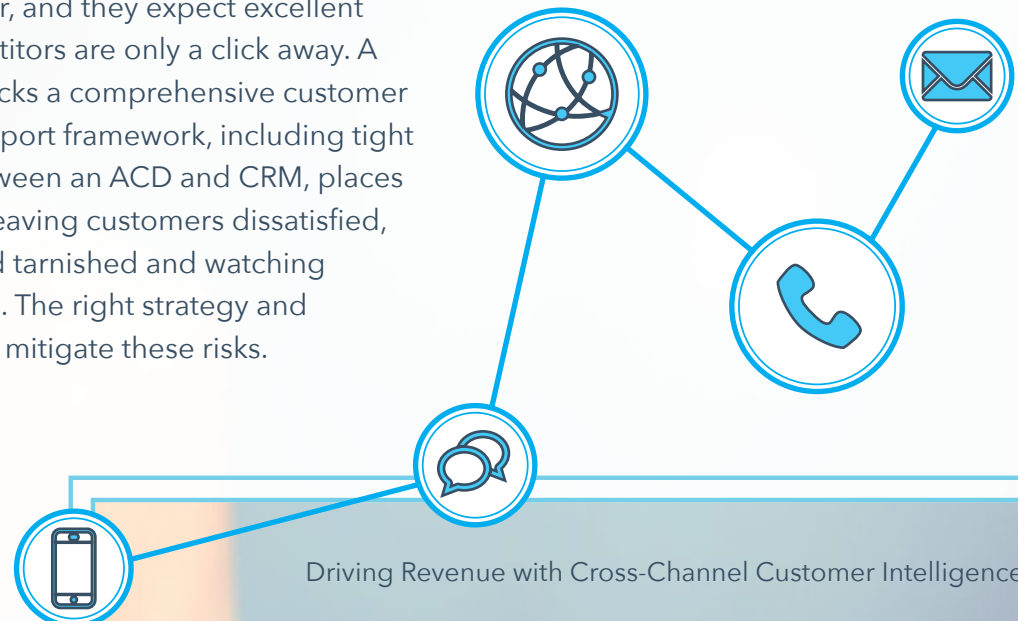
What Is Multi-channel CRM?

Today, contact centers receive inquiries in a variety of ways, including mail, telephone, email, chat services, social media and web forms. Many companies also continue to use voice self-service features and IVRs. The ability to track communication across multiple channels for each customer is critical. The task is magnified by the use of virtual contact centers, where representatives work outside the four walls of the enterprise, often in their own homes.

As a result, there's a need to route inquiries appropriately and for agents to track support requests and activities across multiple channels, rely on a single CRM system, respond based on priority, transfer calls and juggle other important tasks. Within this framework, management requires metrics and the ability to examine individual contact points in order to evaluate business and agent performance. These systems must operate reliably and effectively, and integrate securely with other enterprise systems.

For example, within the Oracle Service Cloud environment, there is a need to be aware of what happened in each channel of contact in order to make data actionable for improving customer service.

THE CHALLENGES OF INTEGRATED ACD AND CRM

Personalization, speed, consistency and agent flexibility are at the foundation of a superior customer experience. You need systems in place, however, that can bridge the gap between call/message handling and data that delivers actionable intelligence. Perhaps somewhat surprising is that it's not just about enabling multiple channels of contact for the customer! Rather, it's the behind-the-scenes capture and presentation of personalized customer data, merged with multi-channel communications enablement to agents and managers that forms the building blocks of the new customer-care foundation.

Communications and data have historically been handled within separate systems. Calls, emails and other forms of contact in the contact center – customer identity, history and other information in the CRM system – were housed in separate systems. That's changing now, as open systems such as the Oracle Service Cloud are being merged with contact channels. The new CRM paradigm "embeds" call and messaging handling with CRM screens for agents along with management (routing/queuing) and reporting for managers. Now agents are more aware of personalized data when interacting across any supported channel (on a call, engaging in chat, etc.), as well as knowing where they have been (logged onto the website, sent a previous email). Managers now have a data-driven decision-making resource.

Managers now have a data-driven decision-making resource for multi-channel customer service.
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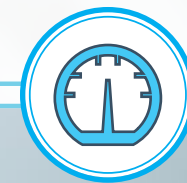
5 KEYS TO WORLD-CLASS ACD INTEGRATION WITH THE ORACLE SERVICE CLOUD

Building better CRM capabilities requires a focus on five primary factors:

A TRUE MULTI-CHANNEL APPROACH. Organizations require the ability to establish a universal queue to manage channel of choice contact from your customers. Basic, conditional, skill-based, intelligent and real-time routing that spans channels, and robust recording and search capabilities are fundamental. Agents must be able to follow and react to all interactions with a customer in real time, regardless of the channel, from within the Oracle Service Cloud media bar by leveraging a centralized knowledge base. An integrated, cloud-based contact center in the Oracle Service Cloud provides greater data flexibility and information-management capabilities by centralizing data streams in the cloud.

TIGHT INTEGRATION. System integration is critical for realizing customer-care excellence resulting from a unified ACD and CRM. Enablement of voice and messaging within the agent's familiar CRM screen essentially works to "normalize" interactions with an agent. Agents see a queue that might include a call, email, chat, etc. Managers can assign agents to any mix of channels with priority, or dedicate channels while going to a single source (their CRM system) for telephony and messaging stats. Going further, agents or managers can click on a customer's CRM record and play a previous call recording, thus capturing (and using) sentiment as well as data.

SPEED, FLEXIBILITY AND RELIABILITY. Real-time customer support is no longer an option; it's a necessity. Agents must be up to speed and armed with the latest information when they interact with customers. Systems must provide enough speed and flexibility so that agents can find the information they need when they need it, and hand off calls and other inquiries when the situation requires it. Cloud-based systems increase speed and flexibility by facilitating data integration but also allowing upgrades and updates to take place on a regular basis, delivering seamless integration with no business disruption. Cloud vendors that focus on innovative ways to help their customers deliver exceptional service introduce new features and functionality on a regular basis. New features and better functionality occur regularly.

SECURITY. Several important factors enter the picture on the security and data privacy fronts: physical security for systems and data; cybersecurity; encryption methods used for data transport; data backups, including how and where they are stored; and educating agents about overall risks and the dangers of failing to adhere to policies and procedures.

KEY PERFORMANCE METRICS. Although every organization must establish a unique set of metrics that matches its needs and requirements, key performance indicators (KPIs) typically center on several key factors: speed, resolution time, satisfaction rates for customers, loyalty levels, security, privacy and various costs. It is important to make ACD data accessible for real-time dashboard reporting within the Oracle Service Cloud.

Organizations must establish a universal queue to manage channel-of-choice contact from customers. @VoltDeltaNews

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TAKING YOUR CONTACT CENTER TO THE NEXT LEVEL

A best-practice approach is within reach. Success spins a tight orbit around identifying key performance factors and linking technology and business processes seamlessly. An organization must provide a high level of personalization and arm agents with the information they need to solve problems quickly and completely. The end goal? Better customer service via a universal queue that blurs the lines between contact channel with benefits for customers, agents and managers. Customers see fast and effective resolution, regardless of the channel they choose to use. They simply see a business that responds to their inquiries and resolves issues without delay.

In order to achieve this level of service, ACD and CRM integration must touch on a few key factors: multimedia routing that "normalizes" contact by handling multiple channels; the ability to build highly flexible business rules into a system, including the ability to prioritize events and trigger specific scripts for specific events; a dashboard that offers immediate access to performance statistics as well as analytics; and the flexibility to change things on an "as needed" basis. When an enterprise addresses all of these issues, it's poised to achieve world-class results.

ACD and CRM integration must "normalize" multi-channel contact with multimedia routing. @VoltDeltaNews

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A WINNING APPROACH

When an organization fully integrates ACD and CRM, it's possible to achieve important benefits:

- Greater personalization

- Contextual awareness across channels

- Faster resolution times

- Improved customer and agent satisfaction; cross-channel analytics and intelligence

- Greater management efficiency due to embedded ACD data in CRM records

- Improved agility

- A more consistent experience

- A 360-degree view of the customer

In the end, these best-practice organizations achieve a customer lifecycle approach that allows the business to act and react proactively to customer needs and better anticipate where a customer is in the buying cycle. They're able to transform the challenges of the digital age into an opportunity and achieve bottom-line results.

About VoltDelta

VoltDelta's cloud contact center solution enhances customer care by integrating multiple channels within the Oracle Service Cloud. A VoltDelta "Media Bar" embedded within Oracle agent screens powers telephony, email, chat and social media support.