



ACD **Empowered** CRM

*The Next Level of Contact Center Integration
to Deliver Exceptional Customer Care*

10 ACD/CRM Questions Answered

WHITE PAPER

- Contextual awareness to enhance customer satisfaction
- CRM intelligence to improve agent performance
- Cross-channel insight for contact agility



A NewNet Company

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10 ACD/CRM Questions Answered

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INTRODUCTION

If you have anything to do with a call center then you probably feel somewhat isolated from other parts of the organization. Your organization may have been kept at a distance because others fear valuable data must be kept away from agents who are frequently viewed as risky, transient workers.

You've been left on your own to fight for tools to deal with increasingly diverse channels that your customers are choosing to interact with you. As a result, you have a myriad of point solutions that probably put out the fire, but now remain as monuments to the stovepipe.

Your team is closest to your customers, but there is no easy way to share insight with other departments beyond the water cooler.

Although you may know information exists within your organization that can improve the lives of your customers, managers, and agents, you can't replace everything to make that happen.

This may be a bleak scenario, but all is not lost. There's now a new opportunity to work with some existing systems and applications to cost-effectively take your customer care to the next level. One of the most impactful opportunities involves integrating a cloud ACD (Automatic Call Distribution) solution and a CRM (Customer Relationship Management) system within your organization.

The following 10 questions answered will focus on this topic.

1) WHAT ARE THE BASICS?

An ACD system's core competency is call directing, queue monitoring and central management for inbound and outbound calls. What you might not be aware of is that ACDs from some vendors are now morphing into Automatic Contact Distributors, enabling customer care for email, chat, and social media in addition to calls (more on this later).

A CRM system on the other hand, manages data associated with each customer. It's designed to consolidate information for billing and marketing and to perform as a central repository of data useful across many departments. In some cases CRM systems package a knowledge base to assist with providing answers to a wide range of potential questions.

Merging these two worlds offers the possibility for injecting intelligence into every contact center interaction for benefits such as:

- Personalization—You know an individual customer is calling, enabling you to more quickly and efficiently meet their needs.
- Insight—Reports enable you to link a cause with an effect such as corroborating (with evidence) an increase in calls to a marketing campaign that was never pre-arranged with the contact center.
- Efficiency—Real-time intelligence for your agents and supervisors helps to reduce errors from agent input, cut down on handle times, limit call-backs, and provide managers with easy-to-access data for quality assurance, cross-department collaboration, and justification for additional investment in personnel or infrastructure.

2) WE ALREADY HAVE INTEGRATED OUR ACD WITH A CRM.....HAVEN'T WE?

Most contact centers do not have agents "flying blind." An agent typically has a CRM of some type on their desktop. It might offer detail about a caller keyed to their phone number, or provide the agent with information to aid with support. The issue is that the agent is usually the "integration point" between the caller and whatever resources are available on the desktop. In many cases this requires flipping between telephony screens and CRM views.

Telephony-empowered CRM is not frequently seen to date. Even rarer are CRM integrations that seamlessly work within the contact center to route multiple channels of communication based on agent skill or other rules. Additionally, data cannot be easily consolidated for agents and managers. As a result, data within the contact center CRM resource stays within its own "stovepipe," as does detail resulting from what the ACD is handling.

The same is true at the management level. It becomes difficult to consolidate reports between systems that simply don't communicate with each other. Frequently in place are ACD and CRM systems provided by departments within the organization that focus on their own areas of expertise without taking a holistic view of the customer. The contact center may even work with a completely different CRM system from that of the organization at large.

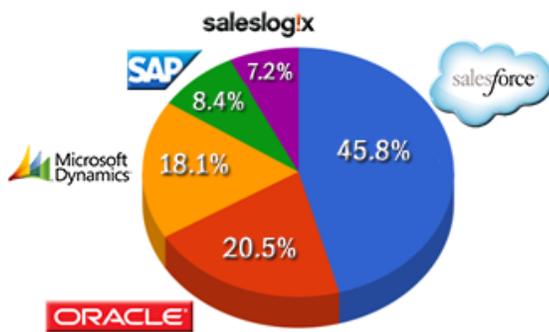
You are far closer to the norm than the exception if any of this resembles your situation. ACDs and CRMs historically have not played well together due to their fundamental focus, technology limitations, and departmental territorialism.

3) WHAT CAN I EXPECT FOR CRM AVAILABILITY BEYOND THE CONTACT CENTER?

Gartner has stated that “customer relationship management (CRM) has edged past enterprise resource planning (ERP) as the top application software investment priority. This further validates a business focus on enhancing customer experience, with both mature and emerging regions emphasizing investments in CRM.” With customer experience called out as the driver, you know that you will need to inject the benefits of additional CRM intelligence into your contact center sooner rather than later.

Gartner identifies the worldwide CRM software market in 2013 at over \$14 billion, with probably more than 40 significant vendors. Approximately 31% of that market is being applied to customer service and support.

There are a handful of market leaders in the CRM space, with leadership positions shifting based upon company size. A CRM Switch survey¹ of US-based companies in 2013 identified the following estimated presence of top 5 CRM systems by vendor for organizations with between 100 and 1,000 employees:

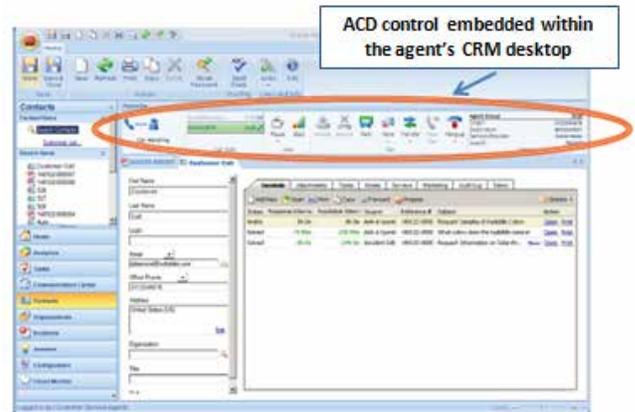


4) WHAT DOES AN ACD/CRM INTEGRATION REALLY MEAN?

At a high level it means merging telephony and messaging with real-time and historical data to fundamentally modify and improve customer care. At its deepest levels it means making the CRM the “Pivot Point” for customer care by adding “Move & Manage” (ACD) detail to each CRM record.

Benefits realized by agents, managers and customers:

Agents—The most visible agent difference is a “unified” screen combining ACD and CRM features such as incoming caller detail with answer/transfer control along with what might be considered a familiar CRM screen. ACD’s with multimedia routing can present calls, email, and chat sessions to agents along with information about who they are interacting with based on phone number or email address. An example screen displaying an ACD “media bar” floating within an Oracle CRM screen is displayed below:



What this means for agents:

- Contextual awareness becomes a reality. Depending upon CRM functionality, agents can see previous activity, cross-channel presence, and marketing promotions offered to add intelligence to each interaction.
- Call & message presentation and control within a unified screen enhances efficiency.

Managers & Supervisors—The ACD has always provided managers and supervisors with centralized control with reporting to identify queue status, agent availability and many other contact center specific features. But they face problems similar to agents with respect to dealing with multiple screens. There is usually no easy way to link call statistics managed by the ACD with customer detail contained within the CRM.

An ACD/CRM integration means statistics such as call, queue, and wait durations, handle time, agent(s) participating and much more can be populated within the CRM record.

What this means for managers and supervisors:

- Managers can now more easily correlate call center performance with bottom-line results. For example, growing wait durations linked with declining revenues on a high value customer sort within the CRM provides a strong case for additional agents and/or updating infrastructure.
- Managers can link cause and effect with empirical evidence. For example, reviewing all customers in the CRM who received a promotion along with their resulting revenue. ACD stats matched with CRM revenue reporting can then be used for positive reinforcement such as results from offers, or negative feedback including reports based on calls being generated by customer confusion.

Customers—As you empower agents with contextual knowledge, you will reap customer satisfaction benefits. Customers today expect that you “know” what they are looking for. They are also taking advantage of mobility to reach out over their channel of choice. They don’t care that they started with chat, but now really want to speak to an agent.

An ACD/CRM integration provides the foundation for cross-channel intelligence. Data captured with the CRM and presented to agents is there for the agent to confirm that they know the caller reached out and now needs additional help.

Customers benefit from an ACD/CRM integration by:

- Personalization—Dealing with agents/automation that know more about their specific issue
- Speed—Possibility to reduce questions based on CRM data
- Consistency—Use of a knowledge base within the CRM assists with standardizing response
- Multichannel—Makes it easy to choose or switch between channels of choice

5) DOES AN ACD/CRM INTEGRATION MAKE THE “UNIVERSAL QUEUE” A REALITY?

Not necessarily, but it certainly helps. Some ACD’s can only route calls. Now appearing are ACD’s capable of multimedia routing. This makes it possible to deploy agents that can handle a mix of calls, email, chat and even social media. If your ACD supports multimedia routing then you don’t absolutely need CRM integration.

However, your customers don’t perceive that there are barriers between channels. Even if you dedicate agents to telephony, you would want them to know that the caller speaking to them already tried text and is now calling in. An ACD/CRM integration consolidates the data, allowing agents to more intelligently resolve customer interactions.

Another value point is taking advantage of social media listening deployed within some CRM systems. A multimedia routing ACD integrated to a CRM that supports social media listening means your agents can review and respond to tweets and posts to expand channel presence.

6) WHAT TYPE OF CONTACT CENTERS BENEFIT FROM AN ACD/CRM INTEGRATION?

Multichannel support is a clear driver for looking at an ACD/CRM integration. The benefits of cross-channel intelligence for agents and managers trickle down to better customer support. Your contact center is an excellent candidate for a capable ACD/CRM integration if you are being pressured to better support multiple channels, or if believe you are missing opportunities because you are limited to telephony and perhaps email.

Agent flexibility is another characteristic that will benefit from an ACD/CRM integration. Blended agents (those handling multiple channels) are appearing within contact centers of all sizes. Improved performance attributed to a more interesting variation of contact requires systems without barriers between channels.

From a reporting perspective an ACD/CRM integration “normalizes” data regardless of channel. This makes it easier for managers to evaluate performance with report consolidation:



7) WHAT ARE THE VALUE POINTS FOR AN ACD/ CRM INTEGRATION?

There are a number of benefits you can expect from an ACD/CRM integration including:

- Personalization derived from CRM presented detail to improve customer care
- Contextual awareness across channels to enhance customer satisfaction
- Faster call resolution due to pre-populated intelligence with lower network & telephony costs
- Improved agent satisfaction (and potentially retention) by providing agents with easy to use intelligence and call/message control while eliminating some mundane data input
- Cross-channel intelligence for statistical insight by auto-populating ACD data within the CRM system
- Management efficiency with ACD data embedded within each CRM record
- Improved agility to assign agents to blended channel support via a universal queue
- Response consistency via CRM-driven knowledge base support
- Ability to provide evidence of success or failure to other parts of the organization
- Capture customer journey detail without channel barriers for quality assurance

8) WHAT ARE THE KEY QUESTIONS TO ASK?

Key areas to consider include:

- Is there an integration available?

In most cases, you will have to work with an existing CRM of some type. Some ACD vendors provide “out of the box” integration to popular CRM systems. In many cases cloud-based ACD and CRM systems facilitate integration.

- What does “integration” mean?

Look for a solution that consolidates ACD and CRM screens, plus data and reporting for agents and managers. This is usually done within the CRM system to facilitate sharing of information across the organization. Be wary of solutions that require multiple screens or reporting demanding that you go back and forth between the ACD and CRM.

- What data is the CRM maintaining?

You need to understand if the existing CRM is tracking detail to help make you successful. For example, cross-channel contextual awareness for agents can only be achieved if the CRM is maintaining data about customer interactions across key channels. Also look for data from the ACD being auto-populated within the CRM.

- Who is responsible for the integration?

Whenever you are working with a multi-vendor solution you need to make sure finger pointing is eliminated if any issues arise. Carefully consider your vendors and make sure you know who is responsible for deployment and ongoing support/updates.

- Are the contact center and CRM managers on the same page?

This one can be a little touchy if the CRM manager fears territory encroachment. However, you have to establish a good working relationship to ensure the technology delivers value. For example, the ACD might be able to provide metrics to the CRM. But that only works if the CRM provides the real estate for it. Also, make sure updates and upgrades for the ACD and or the CRM system are in synch.

- Are agents and managers prepared?

So much of the potential value to be derived from making your ACD and CRM work together depends upon your people! Make sure that your agents know what to do with additional data being sent to their desktop. The same is true with managers. They are already familiar with ACD stats and control. Dealing with a CRM system requires some training to ensure that they can make the best use of the newly available information.

- Is the organization ready to step up to a more holistic perspective for customer interactions?

Senior management sponsorship becomes a vital resource especially when you are working across parts of an organization that may never have collaborated in the past. Take action to educate management on benefits that can be achieved with a capable ACD/CRM integration. Include the CRM team in your investigation of possible solutions. Once deployed, share insights discovered throughout the organization to ensure intelligence you identify is applied for success in the contact center and beyond.

9) ARE THERE BENEFITS THAT REACH BEYOND THE CONTACT CENTER?

Yes, and it is a topic that is potentially overlooked. Data consolidating customer information and contact stats across channels with reporting provides a great resource to expand beyond your “island”.

Senior management will also benefit as an ACD/CRM integration with multichannel report consolidation will assist in distilling “big data” into actionable information. It’s not simply about counting calls or tracking handle time. The “why” is now just as important. Why did the customer reach out? Why are our promotions now being more successful? Why can’t we improve loyalty? Questions of this nature require distilling insight from “big data”. A capable ACD/CRM integration helps to make this happen.

10) HOW CAN I GET STARTED?

Initial steps to take in order to determine if an ACD/CRM integration makes sense for you include:

- 1) Delve into your ACD stats to zero in on customer care “hot spots”—Frequent call-backs and increasing handle time might indicate areas where improvement may yield results from added intelligence within the contact center. Also check your customer satisfaction measures .



- 2) Check with your contact center agents & managers —Ask what the impact would be for their customer care effectiveness if they were provided with more intelligence for each interaction. Drill down into specifically what data would be more useful.
- 3) Reach out to the owner of your organizations’ CRM system—Begin building the bridge between the contact center and CRM infrastructure. Discuss how additional information available within your contact center could provide value to others.

- 4) Identify your multichannel requirements—Expect growing demand to add channels of contact even if you are phone heavy (as most are) today. Also collect any internal data including customer and agent feedback that points to a need to support customers across multiple channels of communication.

- 5) Scope out ACD vendors offering CRM integrations —Review what your possibilities might be. Make sure to understand what “integration” between the ACD and CRM really means as previously discussed in question 4.

These steps are a great start. Remember to educate your senior management, as the impact of a project such as this requires cross-departmental cooperation. As you proceed, remember to keep agents, managers, and the CRM side of the house informed to encourage engagement and success for the long term.

ABOUT VOLTDELTA'S ACD AND CRM INTEGRATED SOLUTIONS

VoltDelta’s cloud contact center includes DeltaACD, offering multimedia routing to agents for voice, email, chat and social media. DeltaACD integrates with Oracle®, Salesforce.com®, Microsoft Dynamics™ and ServiceNow® CRM systems.

Find out more at www.VoltDelta.com Multi-channel CRM

ABOUT VOLTDELTA

VoltDelta is a cloud-based contact center provider with 35 years of experience.

We perform intelligent, data-driven contact management to optimize your customer’s journey. VoltDelta rapidly tailors and integrates our multi-channel contact center solutions to enable you to increase revenue, boost retention and reduce operating costs with proven scalability and reliability.

Our inbound and outbound offerings support virtual and geographically distributed contact centers and remote agents within a highly secure and compliant environment. VoltDelta’s service guarantee is backed by contact center and carrier experts who are dedicated to your success.

1. <http://www.crmswitch.com/crm-industry/usa-crm-market-share-2013/>