

The Value of Connecting Your Phone System and CRM



 InGenius

Contact centers have increasing pressure to be more efficient — to do more with less time, money and resources. Customers also expect better service than ever, and their loyalty depends on a company's ability to deliver.

While anecdotes from angry customers on social media may seem like the exceptional cases, they speak to a real issue. Customers are not able to get the information they need because agents can't give it to them quickly.

Difficult customer interactions contribute to another perennial problem in the call center: under-motivated agents. While reps want to handle calls as efficiently as possible, they often don't have the tools to do so and that inevitably impacts productivity.

Fortunately, joining two essential tools of the call center—the phone system and the CRM—can go a long way toward improving both customer experience and employee morale.

Integrating phone systems into a CRM in the contact center is an easy way to save time and improve the customer experience. This eBook outlines how this type of integration results in better productivity for phone representatives and a better experience for customers.



Why Phone System Integration?

Call center agents often have to work with several different apps and manual processes. When a client calls, agents may record notes in one system, but have to pull up customer information in a second one. Creating new records and logging call details take a lot of extra clicks. This makes interactions with customers take more time than they should.

If the experience is lousy for agents, it's even worse for customers. Who hasn't gotten upset at having to repeat their information every time the call is transferred?

Since the primary interaction many customers have will be through a company's call center, that interaction really matters. If the experience is slow, tedious and repetitive, it won't be long before that's the impression customers have of a company and its solutions.

This is precisely where computer telephone integration (CTI) can help. CTI plugs your phone system directly into your CRM. This consolidates all customer information and interactions into one integrated application. Do you need billing history? Customer address? Notes on a customer's unanswered questions? All the information is available on a single screen at the rep's fingertips.

When companies integrate their phone systems into the CRM, customers spend less time on the phone. Reps experience less frustration toggling between apps and are able to handle calls faster. This enables them to handle more calls each day, resulting in more productivity and, most importantly, happy customers.



Primary Features of an Integrated Phone System

We know: another “integrated” solution. Could anything be more of a buzzword?

But CTI addresses real problems call centers experience: wasted time, angry customers and frustrated agents. The features associated with CTI actually save time for call center agents in the real world. Here are just a few of the main ways it can:

SCREEN POP

For inbound calls, screen pop retrieves customer data on contact center agents’ screens before calls are picked up. Calls are automatically associated with a ticket or record so before reps even answer calls or receive transfers, they have all necessary data at their fingertips. Not only does this contextualize every call that comes in, agents are better able to direct calls to the right person or department the first time. Screen pop saves 20 seconds per call on average.



Screen pop saves 20 seconds per call on average.

CLICK-TO-DIAL

For outbound calls, click-to-dial means agents no longer have to switch between the CRM and the dialing app to call out to customers or prospects. With a CTI solution, agents with a handset or softphone can click on any phone field within the customer profile to dial. Click-to-dial can save agents 15 seconds per call, facilitating more calls to more customers every day.



Click-to-dial can save agents 15 seconds per call.

Primary Features of an Integrated Phone System

CRM SCREEN TRANSFER

When customers need to be passed to a different agent, CRM screen transfer ensures that the next representative has all the relevant information, so that callers don't have to repeat themselves. CRM screen transfer improves the customer experience and provides a more efficient hand-off between agents, saving at least 15 seconds per transferred call.



CRM screen transfer saves 15 seconds per call on average.

AUTOMATED CALL LOGGING

Automated call logging: As a call is winding down, automated call logging lets agents add notes with configurable call log templates. Reps can take free-form minutes, or even input codes to quickly note specific actions. Automated logging reduces the call wrap-up time, saving on average, a whopping 35 seconds per call.



Automated call logging saves an average of 35 seconds per call.

How to Measure the Effectiveness of CTI

It's clear that CTI has the potential to transform your call center — whether you're dialing out or taking inbound calls. But how can you prove it's working for your company? There are a few measurable ways to show how CTI is worth the investment:

1

Reduced call handling time. Because customer service reps get customer info automatically, they spend less time talking to each customer. They can answer more questions or make more sales, and log calls faster. Those who dial out save time by dialing with a single click.

Tip: Measure the change in call handling time before and after adopting CTI technology.

2

Improved customer experience. All data and notes on past interactions are consolidated in the CRM and available on a single screen. Customers who don't have to repeat information are happier with how their calls are handled.

Tip: Ask customers to report their subjective experiences and use customer satisfaction (CSAT) scores. Measure the change after adopting CTI.

3

Better reporting. Because information is captured automatically, managers can pull reports consistently and completely. Not only can they evaluate records of individual calls, they can see how well the call center is performing at a systemic level. In other words, simply having CTI can help prove the productivity improvements managers see intuitively.

Tip: Ask yourself what reports you currently have access to and what information you would like to have. In all likelihood, CTI will enable you to get that data.



web: www.ingenius.com

email: sales@ingenius.com

phone: +1 613-591-9002 x3000

The InGenius Solution

InGenius adapts to unique contact center needs with next-generation CTI. As a CTI innovator, InGenius connects existing telephone systems into leading CRMs with maximum flexibility, for world-class customer experiences. Backed by reliable expertise and superior customer care built over 20 years in the enterprise telephony space, InGenius helps contact centers increase productivity and customer satisfaction.

InGenius Connector Enterprise equips contact centers with tools to increase agent productivity, while providing a better overall customer experience. The intuitive user interface is integrated directly into your CRM, which means fewer clicks for agents, and a single, consolidated repository of customer information for more efficient management. To learn more, contact InGenius today.