



Not Just CTI, Digital Transformation

Beyond the Screen-pop to Modern Customer Experience

 **InGenius**



Customers. They are the source of new ideas for products and services - what's done right and what isn't. Treated well, they are advocates of your brand and a driving force for new customers through social media or a chat with friends over a coffee. No longer just a source of revenue, planned or not, they are the lifeline of your business.

It is widely recognized that the days of calling customer service with simple questions or for simple purchases are long gone. Today's phone call is an educated customer who has used an average of three to four methods of self-service before searching for a number to call. Self-help options typically refer to digital channels, ranging from attempting an easy, online order to a perhaps lengthy "conversation" with a chatbot. But it isn't enough.



It is important for the agents in the contact center to be able to recognize the journey that a customer is on. These ambassadors for your business must ensure the entries into your business from phone calls or social media, your website, chat or SMS are seamless and reflect the values of your company. Each customer interaction is a chance to reinforce your brand.

The Road to Digital Transformation

The changes we see in how customers interact with businesses and what they expect when they do is happening in a context of similar, broader changes in companies – digital transformation. Disruptive technology is exciting, fast moving, process changing and intellectually stimulating - unless it's a distraction from running the business. Then it's painful.

In 2017, the converging dynamics of consumers demanding better services and companies recognizing the limitations of ad hoc, patchwork customer experience solutions, have resulted in the term "digital transformation" being elevated to the top of to-do list of both Chief Information Officers (CIOs) and Chief Marketing Officers (CMOs) worldwide.

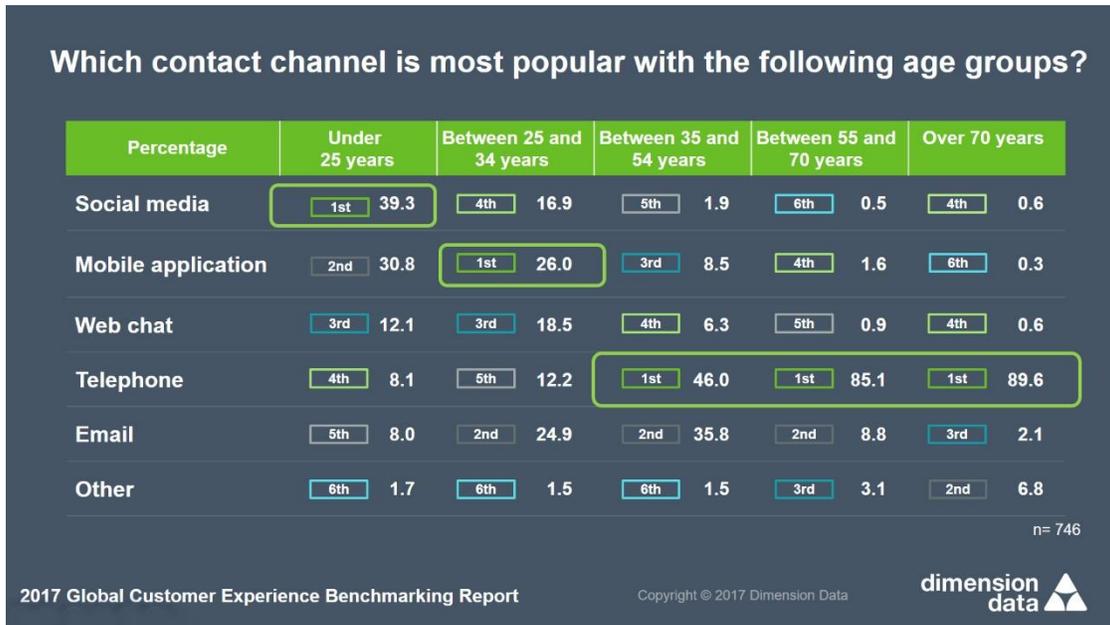
A three-year study conducted by the MIT Center for Digital Business and Capgemini Consulting concluded that only one-third of companies, globally, have an effective digital transformation program in place. This is not surprising, however, since true digital transformation requires investment in both technology to integrate all customer touch points and in process change and education of both IT and customer care staff.

As businesses become more mature in integrating digital technologies, such as social, mobile, analytics and cloud, they will let the technology drive how their businesses work. But for now, most companies focus on solving discrete problems with individual digital technologies or point solutions. It is important when choosing a technology platform to integrate the various pieces of your customer care solution that it is easy to install, quickly customizable and creates as little disruption as possible. This will allow future solutions to be integrated at the speed your organization can accommodate.

Personalization, Key to a Successful Customer Journey

Just as websites are constantly being updated to reflect changes in methods for presenting and communication information, facilitating interaction channels that fit your customers' profile and busy lifestyle should also be in constant review.

For 20 years, global systems integrator Dimension Data has published its Global Customer Experience Benchmarking Report. The 2017 report is based on interviews with contact center executives globally. One of the questions asked was, “Which contact channel is most popular with the following age groups.”



The results are seen in the graphic shown here. The strongest conclusion drawn by Dimension Data was that the use of mobile applications has grown to become a top three choice for everyone under the age of 55. One can also see in the graphic that using social media for customer care is the number one preferred channel by those under 25 years old. Social is ranked at best as the fourth, most preferred channel by all the other age groups.

For those who work in contact centers, it is also perhaps heartening to note that for customers over 35 years old, the telephone remains the preferred communications channel for support. For companies that have customers in just one or two age groups, this data should be enlightening.

- For those targeting the young, it’s past time to make sure your social and mobile customer care processes are in place and prominently marketed.
- For companies who mainly sell and service customers over 55, it is important to make sure that adequate resources remain dedicated to live, telephone-based service.
- For those whose customer base includes people of all ages, making a wide variety of channels available is key to making sure that each customer is able to choose the method that they prefer.

Beyond channel choice, customers are looking for informed agents, who have knowledge of the steps they have already taken in their customer journey. Take for example a call into a service center initiated by an existing customer with an ongoing service case. By equipping the service center with an agent desktop integrated with the company’s CRM solution, the captured contact information such as caller ID or a case number entered into an IVR can be used to personalize the interaction. The information, presented via screen pop to the case manager, will minimize the unproductive time a customer spends providing company name or account numbers.

A well-integrated process will identify the customer regardless if the contact is a call, chat or email. The case manager’s handle time can be spent solving the issue, saving time for the customer and making the case manager more productive. This is the ultimate customer interaction.

Modernizing without Costly Upgrades

Contrary to cloud-based communications systems, today's premises-based telephony solutions, including PBXs and ACDs, have often not been upgraded to current release levels, some for many years. Many companies looking to add email, web chat or text capabilities that customers are demanding find that their current contact center solution will need a major upgrade to offer these necessary digital channels. This can add additional complexity to a company's need to integrate the phone system with customer care applications like CRM, requiring costly and time-consuming upgrades. For the telephony vendor, this is seen as an opportunity to not only sell the company an upgrade but also bill an almost equal amount in professional services fees.

Instead of extending an outdated contact center system, many companies are choosing to deploy digital channels using capabilities embedded in their CRM application, e.g., Salesforce or Oracle. InGenius Connector Enterprise allows companies to integrate an existing phone system with CRM without an expensive, time-consuming upgrade process. InGenius CRM integrations are also available for companies that have already or plan to migrate to modern communications infrastructure, e.g., Asterisk or carrier-based cloud solutions delivered by BroadSoft.

In the sections below, two customers describe how InGenius Connector has worked in their businesses.



When Citrix first approached InGenius, their goal was to provide the service team with visibility into customer entitlements before creating a services case and diagnose any issues. By utilizing a single repository for all customer data, the objective was for both sales and services to be able to share information and communicate effectively, ensuring a better customer experience.

The name Citrix is synonymous with virtualization and cloud-based solutions. As a technical organization, one defining goal is to move more and more processes to a digital solution. Since implementation of the Salesforce-InGenius integration, sales and service have access to the same customer records to ensure a caller receives a consistent experience, regardless of the request.

The Sales team had adopted Salesforce' Sales Cloud. And as the need for a services-focused CRM tool changed, the Service Cloud offering was high on the list for consideration. Citrix deployed the solution for their service desk of over 1,000 agents in 10 locations globally, and began investigating a CTI solution that would provide the required in context screen pops in a completely client-less environment.

"Being a provider of cloud-based solutions, one of our main criteria was a desktop clientless implementation. Many vendors Citrix spoke with said they were using Open CTI, but in fact they were using Salesforce adaptors that still required a tiny client on the machine. This made our global deployment a challenge," reports Erik Coll, Citrix's Manager Contact Center Architecture. "InGenius was the only vendor with a completely clientless solution."

As Citrix customers began using more digital channels to interact with the company, omni-channel integration between InGenius and Salesforce was added. Now customers can inquire about an open ticket or make changes or updates to their account via chat or to open a case via email. This means that Citrix has not only increased customer options and convenience but is providing a consistent experience via digital channels.

"I was impressed with InGenius' ability to customize on the fly," reports Coll. For example, when handling an ongoing service event, Citrix utilizes the InGenius integration to ensure a client with an open case is routed to the exact engineer managing their case. Should that engineer be on another call, the client is presented with the option of holding, leaving a voice mail or going to another engineer in the department for resolution. The client is in control of how they are serviced.

When paired with Salesforce or any other cloud-based CRM solution – such as Microsoft Dynamics 365 – InGenius’ truly clientless profile becomes a powerful choice for enterprises moving to a cloud-based environment. With no desktop client required, agents are free to log in and serve customers regardless of geographic location. Citrix states their Net Promoter Scores have increased and average hold time decreased since the InGenius deployment, a win for both Citrix and their customers.

United Wholesale Mortgage: Business Expansion Requires Updated Tools

United Wholesale Mortgage (UWM) helps independent mortgage professionals by working behind the scenes supporting a network of independent brokers with wholesale loan services from application to underwriting. They pride themselves in championing their clients and offering exemplary client service.

The leadership team was interested in deploying technology that would allow them to scale and grow the organization. They wanted the ability to provide relevant leads to the appropriate account team. They also wanted to deliver tools to help make account managers aware of current events in other departments to ensure that information known about the customer was used to personalize interactions.

After choosing Salesforce.com Sales Cloud as their CRM tool, telephony-based software dialers were installed on every desktop. This was both ineffective and difficult to manage and lacked holistic reporting of account manager’s actual activity. “We had no idea what our account executives were doing or how often we were touching our clients,” states Justin Glass, Chief Digital Officer for UWM. “This is what took us to Salesforce and ultimately to InGenius - the ability to gather accurate metrics.”

After evaluating several new dialer solutions, including a proof of concept project with one vendor that lasted several months, a decision was made to choose and implement InGenius. No upgrades were required to either the telephony platform or desktop. The integration was completed virtually, with no need for a professional services team. There were no process changes, just immediate and integrated reporting. Glass adds “Ultimately, it’s helped us more accurately assign accounts-a smarter division of the workforce.”

In addition to the dialer capabilities used for the account team’s outbound calling, UWM utilizes the integration between InGenius and Salesforce to populate the agent screen with customer information immediately on inbound calls. This allows anyone answering a client’s call, from a receptionist to an underwriter, to greet and appropriately validate the caller. If the purpose of the call can be inferred from the Salesforce CRM record, they can intelligently route the call to the appropriate department.

Though not a part of the initial deployment, inbound calls to UWM’s underwriting team are now measured as well. The underwriting team’s performance jumped from answering about 40 percent of inbound calls prior to the InGenius integration to 95 percent, a true example of Peter Drucker’s adage, “you can’t manage what you don’t measure.” “We use Salesforce and InGenius to track our service levels and that of any team member who handles a client more than once a month,” Glass said.

The Road Ahead

Customers have more power and choice than ever before. Customer experience has become the key differentiator among companies causing CIOs and CMOs to invest in the necessary steps to digitally transform the business.

From a customer perspective, digital transformation means offering an ever-expanding array of voice, digital and mobile interaction channels. From an agent perspective, companies should plan to provide the up-to-date tools needed to guide customers through their service or sales journey. Access to complete customer profiles, including

interaction history across voice and digital channels, will enable customer-facing teams to provide the kind of customer experience that builds long-term loyalty.

About InGenius

InGenius' focus is on the seamless integration of the agent desktop and customer relation management applications. The company's many name-brand references, including Kellogg's, LinkedIn and Expedia, attest to InGenius' knowledge, experience, longevity and dedication to high quality products and service. This has earned the company a 5 star rating on Salesforce's AppExchange.

InGenius has been building solutions to integrate telephony and customer care applications since 2003. It was one of the first companies to release a product based on Salesforce's Open CTI protocol. In fact, InGenius worked closely with Salesforce to contribute to the specs for Open CTI, which has evolved into Lightning Open CTI. InGenius also has close ties with the Microsoft Dynamics 365 team and fully supports the Dynamics 365 product with InGenius Connector Enterprise. In May 2017, InGenius announced the addition of a tight integration with ServiceNow, further enhancing their portfolio of offerings.

InGenius has been in business since 1986.

About McGee-Smith Analytics

Sheila McGee-Smith, the founder and principal analyst at McGee-Smith Analytics, is a leading communications industry analyst and strategic consultant with a proven track record in new product development, competitive assessment, market research, and sales strategies for customer care solutions and services. Her insight helps enterprises and solution providers develop strategies to meet the escalating demands of today's consumer and business customers. She is the contact center track chair for Enterprise Connect and her views on the market can be found regularly on NoJitter.com and through her Twitter feed [@mcgeesmith](https://twitter.com/mcgeesmith).

Elizabeth Ussher has experience both as an industry analyst and Customer Experience leader, helping enterprises realize their vision of a well-executed customer journey through both strategy and practice. She has led global teams in providing actionable sales enablement tools such as competitive intelligence, customer advocacy and social listening programs ensuring the customer's voice is at the core of organizations products, services and metrics. She can be found on Twitter [@eussher](https://twitter.com/eussher).