Making the Most of Your Cloud CRM with an Integrated Cloud Contact Center

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CRM: Essential Systems of Record Across the Enterprise

Once considered software useful for keeping track of sales contacts, CRM applications have evolved into business-critical systems that support sales, marketing, customer service, technical support, and more. And the latest cloud CRM systems – such as those available from salesforce.com and Oracle RightNow – have grown in functionality, enabling them to serve even more organizational functions and support social collaboration within your business. For example, through acquisition, salesforce.com has added new functionality to make their cloud offerings the "system of record" for not only traditional CRM functions (i.e., sales and service), but also HR, finance and other back-office functions within the enterprise.

At the same time, these cloud CRM solutions are giving companies like yours a platform for rapid, continuous innovation. Many are built on open API platforms, which enable cloud CRM providers to simply buy or build custom apps in response to new customer needs and then push them to your business instantly via web services. As a result, cloud providers can innovate and deliver new functionality to your company much faster – as well as avoid burdening you with costly, disruptive upgrades.

As more functionality runs on these platforms, cloud CRM solutions are becoming the "everything" record – filled with a wide variety of business-critical master data and unstructured information that's needed to run your core processes and make informed decisions. But is this system of record being fully utilized to optimize customer interactions and service experiences across the traditional and social channels used by customers today?

The Social Evolution of Customer Interactions

While cloud CRM solutions have been expanding, social media has exploded – and this is driving the social evolution of customer interactions. Today's customers clearly want companies to listen and engage with them in a two-way dialogue – not just "talk at" them – through social media such as Facebook, Twitter, LinkedIn, online communities, blogs, and wikis. And along the way, they are creating massive volumes of customer-generated content, including customer reviews of your products, expressions of satisfaction and dissatisfaction, questions and answers, requests for help, and queries for 1-800 numbers. This content is from people who want to be heard and helped and who, as social consumers, expect you to engage with them personally and in real-time through the channel of their choice.

Failure to do so not only creates customer dissatisfaction, but it also puts your company at risk for public retaliation. For example, if you fail to address a request or question through Facebook in a timely manner, the customer may choose to express their dissatisfaction in open forums such as Twitter, Facebook, and blog posts. These types of social conversations can damage your brand, lower buyer confidence and hurt sales.

Can CRM Systems Alone Meet the Demands of Traditional and Social Customer Service?

Despite the vast functionality offered by CRM systems, these applications still offer limited contact center functionality – especially when it comes to handling voice and social media interactions. This should come as no surprise, as CRM solutions were originally built to capture and store customer contact and interaction data for the sales department – not be on the front lines of handling and optimizing customer support interactions in high-volume, complex contact centers. For example, even the most comprehensive cloud CRM solutions lack built-in voice integration for contact center functions. So at a minimum, cloud CRM providers need to integrate a thirdparty contact center platform that can support calls. Ideally, this platform can, for example, use defined business logic to make optimal, automatic routing decisions – a capability that's essential

to boosting first-call resolution rates and service levels.

Nor do cloud CRM solutions have the native ability to receive and reroute key customer interactions that come in through the contact center via channels such as voice, email, chat, SMS, Twitter, and Facebook. Yet this capability is crucial to delivering effective social customer service. Again, this is not surprising because historically, these types of social media interactions have been handled by marketing and PR departments; so until now, contact centers have never needed to have the functionality to deliver customer support and service through social channels. And as a result, agents are limited in how they can handle these interactions. For example, they can't use the customer data in their company's CRM system to identify a person tweeting or asking for support on Facebook, bring up their contact information and history, and reach out to the customer through the best channel to address their needs (which may be an email or even a phone call, not a tweet). Being able to easily "pivot" to the best channel for follow-up interactions enables agents to respond faster and more effectively to customers.

These are significant functional gaps for contact centers. Why? Because today's social consumers expect fast, personalized social customer service. This means companies know who they are, regardless of the channel they use to ask for service and support; recognize and reward them with consistent, excellent service and offers; and engage with them more frequently and personally (not just at the time of sale) across their preferred channels. To do this, you need to leverage your cloud CRM data to create a single, complete view of each customer and be able to manage personalized, real-time

interactions across all social channels, depending on the situation and customer preference.

At the same time, customers expect companies to respond swiftly and effectively, regardless of how they choose to initiate an interaction or how busy a contact center may be. The challenge

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❝ **There is a strong correlation between the intensity and quality of customer contact and the net lifetime value of that customer."**

— Michael Moaz, Gartner

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for contact centers, of course, is dealing with all of these interactions quickly, efficiently, and effectively. Agents must have tools integrated into their CRM that make it easy to leverage CRM and social data to respond to customers in very personalized, responsive ways. Equally important, agents must have tools that help them work efficiently across multiple channels. For example, they need a flexible, customizable user interface that they can tailor to meet their needs and simplifies pivoting between channels when interacting with customers.

Enhancing CRM to Address New Challenges and Capture New Opportunities

These trends and gaps create huge opportunities for savvy companies because by making the right technology investments, they can differentiate themselves by providing consistent, exceptional, multi-channel customer service and support. Forward-thinking organizations view every customer interaction as strategic because each is considered an opportunity to build stronger

customer relationships that drive retention, higher lifetime customer values, and positive brand impact.

Investments in a social customer service strategy can pay off handsomely. For example, investing in the right contact center platform enables you to fully leverage all the CRM data coming in from traditional and social channels; agents can use this data to engage with customers more effectively across channels and in real time. Furthermore, Gartner notes that, "The increased use of social networks, multiple Web-based interaction channels, and mobile devices improves the opportunities to continually enrich the customer interaction and experience. Peer-to-peer communities, as well as more links to the enterprise via tools such as SMS, Twitter, and Facebook on mobile devices, including tablets, all present relationship-building opportunities." [1]

But to realize these opportunities, you need a way to:

- Aggregate and analyze customer interaction data (including social media interactions) so you can measure the current state of the customer relationships.

- Leverage this data to improve customer experiences and deliver better service, as well as improve marketing, increase sales, and develop better products and services (for example, so agents can provide highly personalized up-sell and cross-sell offers to customers).

- Implement a social customer service strategy that involves enhancing your CRM with a powerful, social-enabled contact center platform that helps you make the most of every customer interaction while improving customer experiences and agent productivity.

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1   Source: The CRM Customer Engagement Hub Targets Social Customers. Gartner. By Michael Maoz. Feb 10, 2012)

Operationalizing and Managing a Social-Enabled Contact Center

Operationalizing a full social customer service strategy – or simply making incremental improvements in the quality of customer service across channels – requires a unified, social-enabled customer contact center.
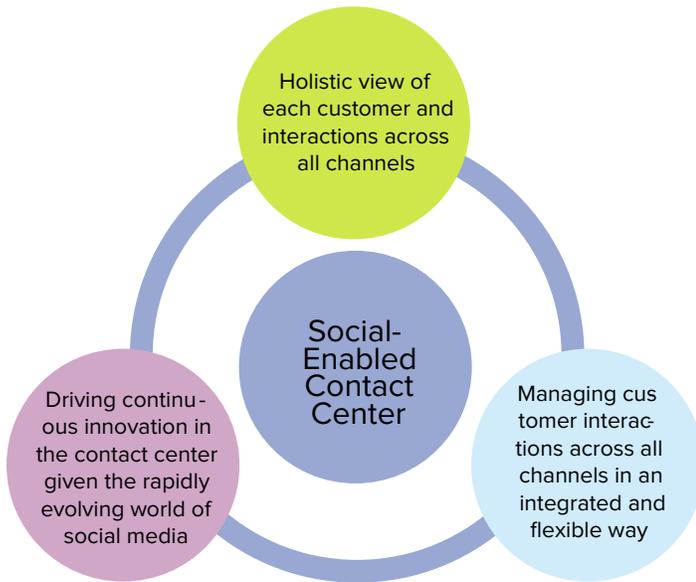

Figure 1: Creating a Unified, Social-Enabled Contact Center

As illustrated in Figure 1, you can turn a cloud CRM solution into a unified, social-enabled customer contact center by integrating a powerful, third-party contact center solution. The right contact center can bring all customer data and interactions into one place, creating a customer interaction hub so all interactions are handled swiftly and consistently, by the best agent available, and through the best channel (via pivoting). This hub can also give agents a unified view of all CRM and social data so that they can provide your customers with highly personalized service that's fast and effective.

Gartner supports this strategy, stating in a recent report that, "The demands of the social and highly mobile customer are forcing change. Business and IT leaders will need to create an enterprise-wide customer engagement hub (CEH) to link various customer constituencies, regardless of the interaction channels." [2] Gartner also notes that for most companies, this will entail investment in new technology; in fact, they forecast that, "Through 2016, 75% of current customer support system (CSS) applications in the contact center will require an overhaul to keep pace with shifting business needs."

An Integrated Voice Channel

Any social-enabled customer contact center should support voice because it remains essential to a social customer service strategy. Currently, voice interactions make up 48% of total customer

interactions – and this percentage is expected to decrease to 38% over the next 2-3 years (see Figure 2).

The fact is some customer problems continue to be best solved by having a knowledgeable agent talking directly to the customer. Talking with customers also gives agents an opportunity to turn unhappy customers into highly satisfied customers, as they can make customers feel taken care of and appreciated by the company. Contact center agents also have real-time insight into customer satisfaction levels and experiences that they get through phone conversations and customer data in back-end CRM systems. This insight helps them service customers in a tailored way that strengthens customer relationships.
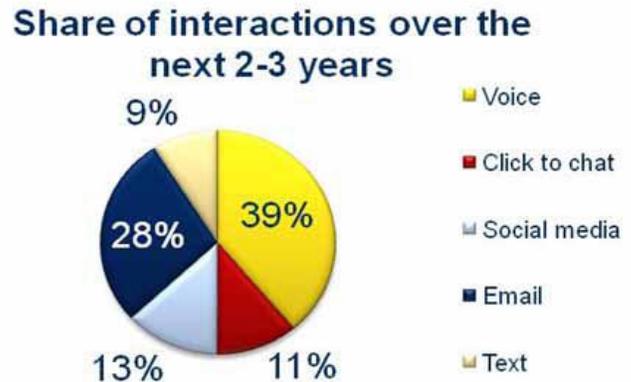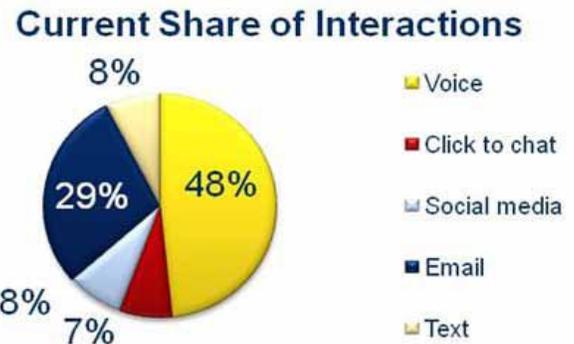

Figure 2: IDC Research Highlights the Ongoing, Strategic Role of the Voice Channel (Source: IDC Presentation titled "Customer Care Buyer Preferences: Highlights of Demand-Side Survey Data"

Support for Multichannel and Social Interactions

Through a social-enabled customer contact center, your agents will also need to engage with customers through their preferred channels, such as Facebook, Twitter, SMS, and Web chat, and be able to customize, or personalize, interactions, service, and offers through these channels. With the right solution, agents should be able to:

- Have customer service issues tweeted or posted on social networks automatically identified and funneled to the right agent

- Associate tweets or posts with each customer's personal and historical data (including data indicating how important a customer is to the company)
- Access everything they need to respond optimally to each customer through his or her preferred channel
- Easily pivot customers to a more appropriate channel – for example, to securely capture credit card information.

Ideally, you can also leverage the customer data coming in through all of these channels – as well as voice – to gain deeper customer insight. Longer term, you can mine the data and feed it back into product development, marketing, sales, distribution, and other departments to:

- Deliver better customer experiences that drive customer retention and referrals
- Identify additional monetization opportunities
- Increase the lifetime spend of customers

Cloud Versus On-Premise Contact Centers: What Works Best with Cloud CRM?

You can choose to integrate a traditional, on-premise contact center solution with your cloud CRM, or you can deploy a cloud based contact center for a "true cloud" solution. But the ideal social-enabled contact center – or customer engagement hub – brings the power of the social-enabled cloud contact center seamlessly into your cloud CRM solution. Is this possible to do with a traditional, on-premise contact center? Can it deliver the same benefits of a cloud-based contact center solution?

In many ways, a non-cloud contact center platform limits the power of your cloud CRM because it:

- Ties it to a technology that lacks agility, flexibility, speed, and scalability
- Makes it difficult to make changes (for example, adjustments to call routing can take months)
- Slows access to innovation
- Can't dynamically route calls (or other channel interactions) to the best agent, regardless of their location

In addition, traditional approaches to contact center software and infrastructure deployments limit your ability to scale contact center capacity to meet changing call volumes and support new interaction channels as they emerge. Hardware is expensive to buy and maintain, as is purchasing and deploying new licenses. So it's not practical to invest in on-site resources to meet sporadic, short-term needs from a time, cost, and resource perspective. You

just end up paying for excess capacity.

Given that the world moves so fast today – and customers demand quicker responses than ever – you can't afford to have systems that hinder your business in these ways. That's why so many companies are turning to cloud-based solutions.

Technology Benefits of a Cloud-on-Cloud Solution

When you complement a cloud CRM (such as Salesforce Service Cloud) with an integrated, cloudbased contact center (such as Serenova™), you can realize the benefits of the "true cloud" across your entire operation. For example, you can realize:

> "Today, salesforce.com considers having a contact center in the cloud essential to providing great customer support. We've been extremely pleased with the Serenova. Our entire mission-critical infrastructure is performing to our high standards enabling salesforce.com to provide high-quality, responsive customer service across all of our customer support centers."
>
> —SVP, Global Customer Support salesforce.com

- **Faster deployments:** With a cloud contact center, you eliminate long deployment cycles, huge capital investments, and costly support contracts because you access capacity and software via a standard Web browser. You can be up and running in days.
- **Unlimited scalability:** With a proven, multi-tenant cloud solution, you can scale infinitely, from a few agents to a hundred to thousands. In addition, through a cloud provider, you can bring up a contact center in minutes, rather than building out a costly contact center and using it occasionally.
- **Flexibility, visibility, and control:** Self-service capabilities are a hallmark of cloud-based applications. Since there is truly no software or hardware to be installed and configured, either physically or virtually, all interaction with the application can happen in real-time directly from a web browser. As a result, you can complete critical tasks on your own such as instant monitoring, reporting and routing changes – without IT assistance.
- **Availability:** Your contact center is a mission-critical application and needs to be available when your customers

want to reach you, anytime of the day or night. Through distributed grid computing technology, it is possible for a cloud-based contact center to deliver >99.99% uptime. And if active-active, servers are always running and replicated in multiple data centers, so upgrades can be done without availability being affected.

- **Innovation:** In a true cloud model, an upgrade, fix or enhancement is made once and deployed to all. You have the ability to choose when to initiate and also benefit immediately from ongoing innovation.

- **Security:** A true cloud offering can provide fundamental capabilities that are built into the code and protect your most sensitive data. You also want a provider with dedicated security experts monitoring 24x7 and risk audit controls that surpass industry standards set by GLBA, PCI, HIPPA and SOX

- **Support for a highly distributed workforce:** Because the software runs in the cloud, contact center agents can access contact center functionality from any PC in any location. So you can hire the best agents from anywhere and improve service levels accordingly.

- **Reduced stress on IT resources:** Because business users can take control over changes they need to make, IT resources are free to focus on other business priorities.

- **Distributed workforce support:** You can easily bring remote workers the full capabilities of premise-based systems — quickly and cost effectively — while reducing overall contact center operational costs.

Salesforce.com Uses Serenova to Power Its Contact Center

Did you know that salesforce.com uses Serenova in its own global customer support contact center? Salesforce Service Cloud integrates with a wide variety of traditional contact center solutions. But management chose to go with Serenova because it's the only one that offers a cloud contact center with sophisticated functionality supporting the voice channel with skills-based routing, high reliability, and seamless integration with Service Cloud. And, with support for multichannel communications, it enables you to establish a true socialenabled contact center. Equally important, salesforce.com could have all of the benefits of an enterprise-grade contact center solution with instant scalability and rapid deployment in a pay-per-use model with no upfront capital cost.
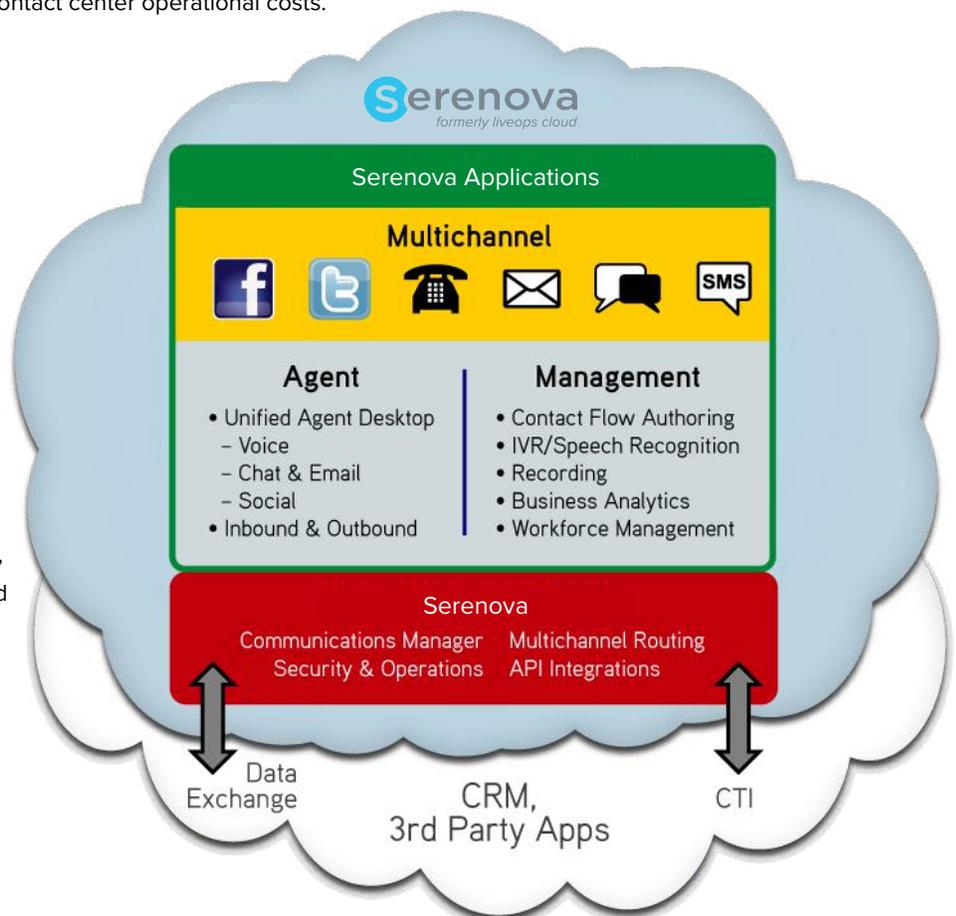

Figure 3: Serenova integrates seamlessly with CRM systems to deliver comprehensive enterprise-ready contact center functionality.

Take Your Cloud CRM to the Next Level with Serenova

Serenova provides the only complete, end-to-end, social-enabled customer service solution (see Figure 3) in the cloud that integrates seamlessly with popular cloud CRM systems and delivers the business benefits of a cloud-on-cloud solution. Unlike other solutions, Serenova brings together complete contact center functionality, multichannel capabilities, and social customer service support in a single solution that integrates with your CRM. It's also easy to implement and simple to use.

On the next page, Table 1 provides an overview of the key benefits you can realize by integrating the Serenova with your CRM.

Table 1: Benefits of Integrating the Serenova with CRM Solutions

	CRM Only	CRM + Serenova
More Intelligent Interaction Routing	• Limited contact channels • Rules-based only • "Pull" queue where agent picks next piece of work	• Integrated multichannel capabilities • Intelligent routing (dynamic routing by skills, presence, customer score, etc.) • Optimized to "push" work to the next best agent
Enhanced Multichannel/Social Capabilities	• May offer text-based channels; growing social channels, but still primarily monitoring tools • Limited and/or siloed engagement, especially challenging for customer interactions across different channels	• Integrated monitoring, measurement and response capabilities • Seamless channel pivot, especially from public to private and back to public • Ability to utilize APIs to further enhance engagement across channels, such as callback
More Powerful Authoring & Management Capabilities	• Limited contact flow authoring capabilities • If using premise-based contact center technology, requires IT and could take weeks/months to make changes	• Business users empowered to manage the customer experience using easy-to-use, drag-and-drop interaction built into the application design • Ability to make changes in minutes vs. weeks/months, that enable a better customer experience
Improved Agent Productivity	• Depending on technology and requirements, agents may need to toggle between multiple windows while working with customers • Lack of flexibility to handle blended-state and/or blended-channel agents	• Seamless agent experience via CTI integration and Data Exchange • Inbound/outbound integration and multichannel agent desktop, which improve agent experiences and productivity • A simplified, optimized interface that fosters agent productivity during customer interactions (vs. CRM systems that are optimized for data entry and retrieval and not focusing on supporting customer communication)
Consolidated Reporting/Analytics	CRM as system of record should provide comprehensive reporting, but reporting is usually limited by channel (i.e., no aggregate reporting)	• Holistic view of customer interaction history in a single record • Data exchange and bidirectional sync that enhances CRM customer records • Immediate visibility into agent activity and queue information through live dashboards and other reporting
Improved Quality	Lack of (or limited) interaction auditing capabilities	100% call recording (as well as cloud-based screen recording) available directly within CRM record/case details

Next Steps

You can integrate and enhance your CRM system quickly and efficiently with Serenova – and have a true, social-enabled contact center that transforms customer experiences. The following questions will help you assess how this investment will improve your ability to meet customer needs and keep agents happy and productive:

• Can your agents easily access a holistic view of each customer (leveraging your CRM data) to understand each customer better, personalize interactions and offers, and efficiently address service issues on the first call? As they capture new customer data, does this data sync bi-directionally so that your CRM system remains your "everything" record?

• Is your agent user interface customizable and designed from the ground up to make agents highly productive and helpful as they engage with customers via calls and across multiple channels? Can they interact with customers across all channels using one, unified user interface?

- Can you automatically route calls and social interactions to the best available agent – regardless of where they are – and enable agents to connect with customers via their preferred channel?

- Can your agents seamlessly pivot between channels when interacting with a customer – for example – from public to private and back to public – when needed?

- Can your business users independently make changes to call routing and other call center functionality – quickly, without involving IT – to continuously improve customer experiences? Do you have the freedom to use APIs to enhance functionality to meet your unique needs and customer requirements?

- Can managers generate comprehensive reports to any level of detail – within and across channels – regarding agents, customers, segments, products and services, and more?

- To maximize agent productivity, can you have agents handle both inbound and outbound calls, switching with ease as call volumes change?

- Can you record and search 100% of all calls and other interactions?

- Do you have immediate visibility into agent activity and queue information through live dashboards and other reports?

Learn More

To learn more about Serenova and how it can enhance your CRM, visit us at www.serenova.com .