Today, businesses of all sizes are rapidly upgrading their network infrastructures to deliver comprehensive IP Communications (IPC) capabilities. One of the most compelling IPC applications is customer relationship management (CRM). When integrated with an IPC network, customer care solutions enable companies to quickly and effectively address customer needs and, by doing so, build and strengthen profitable customer relationships. In the past, an IP-based CRM offering was only available to enterprise-size organizations.

Developed by Cisco Systems® with the support from Microsoft Corporation, the Cisco® CRM Communications Connector (Communications Connector) now enables small and mid-size businesses (SMBs) and empowered branch offices to provide superior customer service by connecting Cisco IPC solutions, such as Cisco CallManager, with the Microsoft Business Solution Customer Relationship Management (Microsoft CRM) application. Communications Connector features include screen pops, click to dial, call duration tracking, call information capture, and customer record creation—all through an easy-to-use interface.

The Communications Connector is an ideal way for SMBs and branch offices to create a comprehensive, value-added CRM solution built on Microsoft CRM and Cisco IPC. The Communications Connector enables all employees within an organization—not only call center agents—to improve productivity and deliver superior customer service. The Communications Connector is supported by Cisco CallManager for SMBs and Branch Offices.

BUSINESS CHALLENGE

In early 2004, Coleman Technologies, Inc. (CTI), a Cisco Systems Gold Partner with IP Telephony Specialization, beta tested and implemented the Cisco Communications Connector with Cisco CallManager throughout its organization. CTI is an employee-owned business founded in 1995 that supports complex system engineering efforts with immediate practical assistance and targeted strategic planning in computer networking and Internet services. CTI has extensive experience in systems engineering methodology for the aerospace industry—experience that has been used to successfully support clients representing local, state, and U.S. government organizations, as well as large international commercial organizations.

With 120 employees and annual revenues of more than $70M, CTI has corporate offices in Orlando, Florida, with regional offices in Tampa, Jacksonville, Ft. Lauderdale, and Tennessee. CTI focuses on organizations with large-scale, distributed networking needs, such as healthcare, utilities, national commercial, and regional governmental organizations.
CTI was an early adopter of IP telephony. In 2000, CTI deployed Cisco IP telephony products throughout its organization. With several thousand installed IP phones, CTI has extensive experience in all aspects of IP telephony, and has developed comprehensive installation guidelines. These guidelines—such as hardware gap analysis, traffic analysis, and network design—help CTI develop and maintain successful and ongoing engagements with clients.

CTI was already using Microsoft CRM, so when Cisco asked them to beta test the new Communications Connector, they immediately saw its potential. “We have a reputation for engineering excellence,” says Randy Olsson, CTI’s director of network engineering. “We won’t just jump on a new product and start selling it unless it’s installed here first.” CTI felt that the Cisco CRM Communications Connector and CallManager products provided a ‘natural fit’ to connect CRM and IP telephony together, but wanted familiarity with the Communications Connector before offering the solution to customers.

**NETWORK SOLUTION**

In the past, when CTI’s account managers took calls from customers, they often had to place the customers on hold to retrieve their profiles and account histories which created lengthy delays for the customers. With the introduction of the Communications Connector, account managers never have to leave their customers waiting. “Our account managers can now greet their customers by name and provide a much higher ‘customer touch,’” says Olsson.

When a customer calls CTI, the caller ID is registered through the Communication Connector and the CallManager device, which immediately provides an online pop-up of the customer’s profile on the account manager’s screen, displaying current and past products, as well as sales information and account relationships. “You don’t have to go find the database file and try to refresh your memory on what the customer’s concerns are,” says Olsson. “Customers expect this now from us and see this as the normal way to do business with CTI.”

**BUSINESS VALUE**

**Cisco CRM Communications Connector Benefits for SMBs**

- Increases sales and service productivity as well as customer loyalty for SMBs by providing a single view of all customer communications for all employees within a company, not just call center agents.
- Enables everyone to deliver more personal customer service from the information in screen popups.
- Provides ease of use and high adoption rates, because it works with Microsoft Outlook and Internet Explorer clients.
- Provides ease and efficiency of placing calls with click-to-dial.
- Enables accurate and complete billing with call duration tracking.
- Avoids data “silos” inside organizations by integrating voice communications with CRM.

Cisco IP telephony solutions and the Communications Connector deliver additional benefits to CTI. An account representative can be working from home with an IP Phone and will have access to a customer’s caller ID. “The customer calls the office, but our account rep can access the call from home, just as if they were in the office—and the customer’s file immediately pops up on the screen,” says Olsson.

Most CTI account representatives now have IP phones running directly from their laptop computers, and receive customer calls that way. Using a broadband connection into CTI’s virtual private network (VPN), an account representative can plug a USB headset into his or her portable computer and be able to work as though in the office.
According to Olsson, this efficiency makes for a very mobile workforce. “One of our network engineers was working on an installation in India. He used a local Internet connection and his IP Phone to call us. I got the call and his local office extension number popped up on my screen, as if he was right next door!”

**NEXT STEPS**

CTI is introducing Microsoft CRM and Cisco CRM Communications Connector, CallManager, and IP telephony products as a customer solution. “We recently implemented this package with a nationally known manufacturing shop. They have a service center with a large warehouse area and a busy call center. Six to eight people are staffing the phones at any given time,” says Olsson. “They needed a way to immediately let customers know the location of their products at any point in the manufacturing process. The screen pop feature really provides an excellent extra level of service, at a minimal cost.”

For more information on the Cisco CRM Communications Connector, please go to: [http://www.cisco.com/go/ciscomicrosoftsmb](http://www.cisco.com/go/ciscomicrosoftsmb) and from the left-hand menu select “Solution Portfolio.”