

Cisco Unified CRM Connector for Salesforce™

Brief Overview

The Cisco® Unified CRM Connector for Cisco Unified Contact Center Enterprise and Hosted and Cisco Unified Intelligent Contact Management provides contact centers with unified call flows, business processes, and desktops for both call handling and business-transaction navigation.

Product Overview

Modern call centers need unified call flows, business processes, and desktops for both call handling and business-transaction navigation. The Cisco Unified CRM Connector for Cisco Unified Contact Center Enterprise and Hosted and Cisco Unified Intelligent Contact Management provides these capabilities in an easily deployed product with support for Salesforce. With Cisco Unified CRM Connector, agents can place, receive, and transfer customer interactions with full, real-time access to Salesforce CRM customer data — saving money, increasing revenue, improving monitoring, and enabling enhanced customer service.

Your company can save costs, improve efficiency, and increase revenue by using Cisco Unified CRM Connector to integrate your Salesforce customer-relationship-management (CRM) customer database applications with Cisco Unified Contact Center solutions. This integration allows for a screen pop of Salesforce information on the agent's terminal simultaneously with the call arrival; look-up of Salesforce information by phone number, agent, or interactive voice response (IVR) entered information; conference, transfer, and routing calls from within the Salesforce screen; and logging of activity for incoming and outgoing calls in the Salesforce database.

How Cisco Unified CRM Connector for Salesforce Works

Through tight integration, Cisco contact centers can improve call management and enable full computer-telephony-integration (CTI) functions using the Salesforce user interface, including agent login, desktop phone controls, caller identification, and screen pop. In order to facilitate the integration with the Salesforce application, which is hosted by a service provider, a CRM adapter is loaded on the agent desktop.

Agents can place, receive, and transfer customer interactions with full, real-time access to salesforce customer data. First call resolution can be enhanced using business rules and customer data residing in Salesforce to help ensure that customers quickly reach the right agent, the first time.

The Cisco Unified CRM Connector for Salesforce features an open architecture that easily and transparently integrates the Salesforce softphone user interface with Cisco contact center solutions.

Applications

Following is an example of how you can use Cisco Unified CRM Connector for Saleforce in conjunction with Cisco Unified Contact Center in a contact center environment:

- When agents start Salesforce on their desktop, the Salesforce CRM Adapter also starts and logs the agent into the Cisco Unified Contact Center or the automatic call distributor

(ACD) through Cisco Unified Intelligent Contact Management using agent settings stored in Salesforce.

- Agents use the softphone to prepare for a call. The ready request is passed through the CRM adapter and the Cisco Unified CRM Connector to Cisco Unified Contact Center (or Cisco Unified Intelligent Contact Management).
- A call comes in to Cisco Unified Contact Center or Cisco Unified Intelligent Contact Management and the Cisco Unified CRM Connector monitors call events, capturing call information, events, and agent state.
- The Cisco Unified Contact Center or Cisco Unified Intelligent Contact Management directs the call to the Cisco Unified Customer Voice Portal to collect data such as account number or specific business information such as catalog item to be purchased, service requests, orders, quotes, etc. This information is added to the call as call-attached data and is captured by the CRM Connector for use in the screen pop.
- One of the following takes place:
 - Cisco Unified Contact Center routes and queues the call for the target agent group.
 - The older ACD routes and queues the call for the target agent groups with assistance from Cisco Unified Intelligent Contact Management.
- Cisco Unified Contact Center or Cisco Unified Intelligent Contact Management selects an agent, routes the call to the agent, and sends call data through Cisco Unified CRM Connector to Salesforce through the Salesforce CRM Adapter. When the call is delivered to the available agent, it rings on the agent's phone and the Cisco Unified CRM Connector tracks the call and delivers the call information and alerting event through the Salesforce CRM Adapter to the agent's softphone.
- The Salesforce softphone alerts the agent of the incoming call and activates its "Answer" button. At the same time, Salesforce executes a screen pop using the call-attached data provided through the adapter.
- The agent clicks on the softphone "Answer" button. This action answers the call, passing the command back through the Salesforce CRM Adapter, and through the Cisco Unified CRM Connector to Cisco Unified Contact Center or Cisco Unified Intelligent Contact Management, which answers the call.
- The agent can now navigate the contact information in Salesforce from the screen pop record and control the phone transparently from within the Salesforce browser.
- The agent modifies call data, including wrap-up, in the Salesforce screen.
- The agent or caller terminates the call; call data is sent back to Salesforce and to Cisco Unified Contact Center or Cisco Unified Intelligent Contact Management.

Features and Benefits

Cisco Unified Contact Center solutions can help your business move into the next phase of customer contact — beyond today's contact center to a Customer Interaction Network. The Customer Interaction Network is a distributed, IP-based customer service infrastructure that comprises a continuously evolving suite of innovative, multichannel Cisco services and CRM applications. These services and applications can help your organization deliver exceptional customer service. A Customer Interaction Network extends customer service capabilities across the entire organization, giving your business a more integrated and collaborative approach to customer satisfaction and leading to a better, more unique, customer-centric experience.

Combined with Cisco Unified Contact Center or Cisco Unified Intelligent Contact Management, Cisco Unified CRM Connector for Salesforce delivers the following advantages:

- **Improved efficiency and cost savings:** Cisco Unified CRM Connector for Salesforce can reduce call time, speed resolutions, and allow for faster call processing. You can shorten the total time agents spend on inbound calls by as much as 20 seconds every call by providing customer information to an agent's desktop at the same time a customer call arrives. Depending on the number of agents, this cost savings alone can provide a rapid return on investment (ROI). In addition, quick resolution of customer concerns is possible, because agents can now use the historical information in Salesforce to shorten call hold times and quickly address the customer's concern when they pick up the call. Finally, simple on-screen click-to-talk capabilities are integrated in the Salesforce screen, allowing agents to manage inbound calls faster and initiate outbound calls quickly. These improved efficiencies add to the overall cost savings in the contact center and translate to your company's profitability — positively affecting your ROI.
- **Enhanced customer experiences:** Cisco Unified CRM Connector helps agents get a full view of the customer's information from multiple contacts. Providing an exceptional customer experience is now possible because agent access to all of this information allows for a more personal interaction, quickly and efficiently providing accurate information for faster handling of customer concerns without the need for repeated calls. Companies deploying Cisco Unified CRM Connector for Salesforce can differentiate themselves from the competition by improved customer satisfaction.
- **Increased revenue:** Integration of call centers with Salesforce CRM information is the key to increased revenue by enabling every employee to become a sales representative for the company. Even customer service representatives can now be empowered to suggest cross-selling products, and the inbound sales representatives also can improve up-sell rates with the wealth of information that is quickly presented on their screens, including sales data and detailed business information. In addition, outbound campaigns can use the CRM integration to improve revenue by giving agents customer information upon call connection, helping the agent identify the customer and customize the interaction.
- **Proven integration solution:** Cisco Unified CRM Connector for Salesforce is a proven, certified product for integrating Salesforce with Cisco Contact Center solutions — assuring companies of an efficient implementation and a lower total cost of ownership.

Table 1 lists additional features and benefits of Cisco Unified CRM Connector for Salesforce.

Table 1. Features and Benefits of Cisco Unified CRM Connector for Salesforce

Feature	Benefit
Automatic logging	Agents no longer need to remember to log inbound and outbound call events into Salesforce. Logging call events into Salesforce is now automatic, allowing administrators to have accurate reports of all agent activity from within Salesforce.
One-click dialing	Agents need only to click on the phone number to place calls, removing the possibility of manually dialing the wrong number, a situation that can happen as frequently as 10 percent of the time in some cases.
Prepackaged integration	Prepackaged integration between Salesforce and the Cisco Unified Contact Center solutions allows for fast, easy installation, committed future growth, and corresponding upgrades to Cisco Unified Contact Center and Salesforce.
Full telephony functions	Full telephony functions in the Salesforce agent desktop include desktop phone control, caller identification, and screen pops.
Proven architecture	This robust, proven architecture has been successfully deployed at numerous large enterprises worldwide.

Expanded functions of Salesforce	Contact centers can expand the functions of their Salesforce agent desktop to support full contact center capabilities.
Real-time control	Agents can effectively place, receive, and transfer interactions with full, real-time access to customer data in Salesforce. This level of control facilitates real-time management of customer interactions in a true multivendor environment, taking advantage of existing or new infrastructure investments.

For More Information

For more information about Cisco Unified CRM Connector for Salesforce, please visit

<http://www.cisco.com/en/US/products/ps9117/index.html>.



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