

Leveraging Data with Contact Center for Dramatic Business Results

Real World Examples with Real Solutions

By Travis Dillard

Introduction

Looking for a significant strategy that will boost sales and improve your customer service? Your ticket to success might be lurking right beneath the surface...

Fact is, you're sitting on the very asset that can help you create unforgettable experiences for your customers and prospects, dramatically differentiate yourself in your industry, double your revenue and triple your profits!

What are you, and countless others, failing to leverage?

Your customer and prospects' data.

Data – The Missed Connections in Your Company/Customer Love Story



You know your customer inside out – including the most basic information, yet you ask them for it every time they contact you – showing little respect for their time and zero personal touch.



You know your fastest growing customer segments are millennials who like to do business and communicate via digital mediums like e-commerce, social media and web chat, yet you force them to call you.



You know your customers' most intimate details like their preferences, demographics, buying behaviors and payment patterns, yet you treat them as though they are strangers.



You know which of your customers are in the "20% VIP" category that contributes to 80% of your revenue, yet you treat them like everybody else.

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Alignment – Reaching Out to Your Customer

The criminal misalignment between technology, data and business initiatives is a common mistake. The good news is that aligning these things can have the most dramatic impact on your business. There are many examples of how this can be done. Because we're focused on communications technology, we'll keep this discussion centered on integrating your data and most likely your most valuable communications asset – your contact center.

Too often, technical integrators or Value Added Resellers (VARs) get hung up on the technology “feeds and speeds” of a solution with little focus on the business requirements of their customers. This issue is made exponentially worse with contact centers. Most integrators are intimidated by contact center technology and only have a high-level grasp of the technical configuration parameters. They have little

to no appreciation of the business power a contact center can provide an organization when properly aligned with the business requirements, especially when the contact center is integrated with the company's data (CRM, ERP, etc.).

Contact Center – Bringing Business Power & Business Requirements Together

A recent industry recap of Contact Center Trends cites that CRM integration and Personalized Service via customer data is a “trend” and will continue to be a more focused trend in 2016. Let's face it— customer experience will make or break business success, now more than ever. Organizations that have figured this out are thriving. It's time to stop looking at your contact center as a phone system. Even more, it's time to stop looking at contact center and your corporate data as two separate things. Exploit the power of both by integrating them and transform your value proposition and customer experiences!

To demonstrate the power of integrating data and contact centers, we've picked out a couple of our own ShoreTel contact center customers to highlight this concept. Keep in mind these examples don't just apply to ShoreTel contact center customers. These concepts can be applied to many current contact center technologies on the market.

Real World Example #1

Zillow: Inbound Marketing

The Company:

Zillow is the leading real estate and rental marketplace dedicated to empowering consumers with data, inspiration and knowledge around the place they call home, and connecting them with the best local professionals who can help.

The Data:

Salesforce.com CRM

Contact Center:

ShoreTel Enterprise Contact Center (ECC)

The Business Requirement:

Timing and accuracy of delivery of an inbound sales call is imperative for Zillow. Seconds can make or break the chance to gain another customer and generate revenue.

When a customer or potential customer calls into Zillow, it is important for that call to be routed to the sales person that manages that account. If a sales rep isn't assigned, the call needs to be routed to the agent that last interacted, or attempted to interact, with that prospect.

If this is the first time a prospect calls into Zillow, the call needs to be routed to the geographical sales team responsible for that region.

When that inbound call reaches the desired sales representative, Zillow needs the rep to immediately have the customer's account up so they can view all recent activity and other vital information about the prospect or customer.

The familiarity and relationship between the customer and sales rep has most likely been established, thus increasing the probability of closing the sale. Moreover, this "intelligent call routing" and instant familiarity with the prospect, their history and interests, provides the desired customer experience Zillow is striving for.

To add complexity to the requirements, Zillow had just acquired Trulia. Both companies were on separate contact center systems and separate Salesforce.com instances. Zillow needed to merge their CRM systems, implement a holistic single contact center system nationally and integrate ShoreTel Contact Center with Salesforce.com in two months.

The Fix:

- 1** Both Trulia and Zillow had separate onsite ShoreTel Unified Communications systems. Zillow was using ShoreTel's Workgroups as their call center solution. Trulia was using a cloud-based contact center system called LiveOps. Inflow first had to merge the two ShoreTel systems to create a single-image instance across all Zillow and Trulia sites.
- 2** Next, Inflow implemented a nation-wide ShoreTel Enterprise Contact Center (ECC) system to displace LiveOps and ShoreTel Workgroups.
- 3** Last, Inflow leveraged three different native ShoreTel-to-Salesforce.com integrations packages to achieve the customer experience results Zillow was striving for.

The Results

ShoreTel Salesforce Call Router:

Using ShoreTel's ECC built-in business process and scripting tools, the following happens:



- ShoreTel collects the caller ID of the inbound call and queries the Salesforce.com database to determine the sales rep assigned to the account. If a match is found, the call is immediately routed to the sales rep. The customer gets the choice to “hold” for the rep if they’re on the phone or transfer to another rep that can help.
- If an assigned sales rep isn’t found, the system routes the call to the sales rep that last entered an activity in that prospect’s account record.
- If the first two logic steps don’t find a match, route the call to the sales team responsible for that geographical territory.

ShoreTel Salesforce Call Adapter:

When the sales agent answers the call, the ShoreTel system will “pop” the customer or prospect’s account record in Salesforce.com. This allows the agent to see all pertinent information about the prospect to include previous interactions, sales information, opportunities, etc. If the account is in the system, the rep can immediately tag notes to the call and timestamps the call. If the account is not in Salesforce.com, the rep gets the ability to create an account on the fly and dynamically populate account contact information and activities. The ShoreTel Salesforce.com adapter allows the rep to initiate, answer, transfer, place on hold and other telephony features right from Salesforce.com.



ShoreTel Salesforce.com Reporting Tool:

And probably the most important aspect of a sound call center operation – **metrics, reporting** and **Business Intelligence (BI)**. All **ShoreTel Call Detail Records (CDR)** are dynamically pushed up to the Salesforce cloud to provide true “**single panel of glass**” reporting for all contact center and Salesforce.com data in one view.

Skills-Based and Priority Routing:

The ShoreTel system route calls based on the sales agent or area code information. The ShoreTel system can “collect” multiple data points about the customer and prospect and make custom routing decisions based on what’s learned. For example, different classifications of customers can be determined (home owner versus real estate agent) and routed to the group or groups that have the skills to handle that call. Also, “VIP” customers can get routed to dedicated employees or team members best suited to work with these types of customers.

Real World Example #2

National Franchise

Leader in Food Delivery:

Customer Service

The Company:

This national franchise leader in food delivery's concept of "take-n-bake" pizza began in 1981. Today they continue to focus on what has made this franchise leader the fifth-largest pizza company in the United States and the #1-Rated Restaurant Chain.

They're proud to provide a convenient and delicious meal at a great value from more than 1,400 locations in the United States, Canada and United Arab Emirates.

The Data:

Cherwell Helpdesk Software

Contact Center:

ShoreTel Enterprise Contact Center (ECC)

The Business Requirement:

The national franchise administration office's primary mission is to support their franchisees located throughout the world. Support services range from IT to marketing to accounting. Their franchisees are their customers and life-blood.

The success of their franchisees directly correlates to their revenues and the recruitment of more franchisees. Providing immediate, expert support, across many disciplines, tailored to the individual franchisee is critical to executing their business objectives.

The franchise leader needed to set up and staff a dedicated contact center to support their franchisees. This "help desk" needed to be staffed with people of varying skills to meet the many different needs and requirements of their customers. Additionally, they needed to select and deploy a help desk system.

The Fix:

The franchise leader had yet to select their helpdesk software, when they chose Inflow and ShoreTel as the Unified Communications Solution to replace their old, unsupported 3Comm phone system. ShoreTel's open architecture allows it to be easily integrated with standards-based applications. This "future-proof" architecture made ShoreTel an easy choice for this national franchise leader.

In the end, the national franchise selected Cherwell as their helpdesk service software and Inflow was tasked with designing, deploying and supporting a ShoreTel Enterprise Contact Center.

The Results:

Inflow worked with Cherwell to develop a custom solution to do the following:

- The ShoreTel ECC system collects the caller ID of the help desk's inbound calls.
- Via the ShoreTel ECC scripting tool, the system "dips" into the Cherwell database to see if there are any open tickets with that franchisee.
- The system routes the call to the help desk staff member that was working that particular ticket last. This ensures continuity of support and great customer experiences.
- If that staff member isn't available, the system uses intelligent skills-based routing to get the caller to another staff member that has the skill set / ticket match to assist that franchisee immediately (IT, marketing, etc.)

What Makes BI So Intelligent?

BI analysis allows both strategic and tactical decision-making easy by providing:

- Visual Reports
- Dashboards
- KPIs
- Data Mining
- Predictive Analytics
- Statistical Analytics

- When the call is delivered to an agent, it will "pop" the franchisee's account record in Cherwell, along with all open tickets, so the agent can see previous activities and history with that customer, allowing them to assist and resolve issues quickly.
- All call activity is automatically logged against the ticket with the appropriate time stamps.
- Business Intelligence (BI) reports are generated to identify problem trends, franchisee training opportunities, staffing needs and other things to improve efficiency and the customer experience.



"POP" ACCOUNT RECORDS

More Real World Examples to Consider

A Multisite, National Health Care Company that Leverages Digital Marketing

This health care company leverages digital marketing to drive prospective patients to their many website landing pages. They offer live chat, a preferred method of communicating, for potential patients whom have sensitive mental health issues. The web chat is integrated with the ShoreTel Contact Center and Salesforce.com. Because the URL of the landing page is dynamically pushed into Salesforce, the marketing team can track which pages are generating the most inbound activity and leads, helping them make better marketing investment decisions.

High-end Pizza Delivery Company that Focuses on Customer Experience

When you call they “magically” know who you are, your favorite pizza toppings, the gate code to your condo complex and your dog’s name before they even say “hello” in under 3 rings. Unlike other pizza companies, the experience is unforgettable. It’s so unique, you tell your friends about it. You feel like you’re part of the family. You are loyal. What you don’t know, is that based on the number of orders you place a year, the system auto-

matically “grades” you to determine which agent takes your call and the types of promotions they should offer you. What’s going on behind the curtain? It’s a ShoreTel Enterprise Contact Center integrated with a home-grown CRM system that’s been collecting data on their customers for over a decade. Again, data leveraged right can be the most powerful asset you have.

A Health Care Company with Microsoft Dynamics and ShoreTel ECC

The ShoreTel Enterprise Contact Center system routes calls based on patient type and agent skill level. Self-help features allow the patient to enter their prescription order numbers, get status and have the ability to transfer to a live agent if they have questions. The agents promptly answer the call, addressing the patient by their name and already has the information about them and their order at their fingertips via a screen pop out of Microsoft Dynamics.

Conclusion:

These are just a few examples of the projects we work on and support. The complexity of integrating your data and contact center can range from the basic to very advanced. That said, the end product is generally better technology / business alignment, a significant competitive advantage in your industry and millions of large and small positive customer experiences that will propel your organization into the new world of “customer experience” and greatness.

Reach out to me or a member of our Contact Center team with your questions. We love to share our knowledge and there is almost nothing that we have not seen yet in the Contact Center world. We have been delivering creative solutions to our clients. We also provide a complimentary high-level contact center business audit for those who qualify.

About the Author



Travis Dillard is the President of Inflow Communications, Inc. He joined the company in 2006 and began shaping Inflow into what it is today: a firm that strives to be the most focused and competent Unified Communications provider in the nation. Travis has been in the technical communications field for over 20 years.

His career started in the United States Air Force, traveling the world as a Combat Communications Technician focusing on tactical voice, Satellite Communications, and global Wide Area Networks.

Upon leaving the military, he founded Packet Network Architects (PNA), a Northwest Wide Area Network (WAN) integrator that specialized in Voice over IP and Frame Relay technologies. He sold PNA in 2001 and filled the Director of Sales and Marketing role for Accolade Technologies, a Northwest Integrator of voice, video, and data that specializes in Avaya communications systems.

In 2009, Travis became President and owner of Inflow and hasn't looked back.

About Inflow Communications

Recently named a winner of the ShoreTel Circle of Excellence Partners award, Inflow Communications is a national leader in ShoreTel Unified Communications and Contact Centers. Founded in 1997, Inflow has offices in Portland, Seattle, Dallas, LA and the Bay Area and is one of the nation's top Unified Communications providers in today's market. With over 70,000 endpoints under Inflow's innovative support plans around the world, Inflow's dedication to knowledge and innovation, and unrivaled ShoreTel customer support, has landed them in ShoreTel's top 2% in global customer satisfaction and is ShoreTel's fastest growing partner in the world.