Case Study: **Zillow**®

Introduction

A recent industry recap of Contact Center Trends cites that CRM integration and Personalized Service via customer data will continue to be a more focused trend in 2016. And one way we're seeing organizations take the reins on their customer experience is by combining their contact center and corporate data. Leveraged together, businesses are assessing their clients' needs in seconds. And for one of our recent clients, Zillow, seconds make or break their chance to gain another customer and generate revenue. Let's take a look at their business needs and how they created an advanced customer service experience.

The Problem

Timing and accuracy of delivery of an inbound sales call is imperative for Zillow. 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 calls 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 information about the prospect or customer. This "intelligent call routing" and instant familiarity with the prospect, their history and interest, 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 instances. Zillow needed to merge their CRM systems, implement a holistic single contact center system nationally and integrate ShoreTel Contact Center with Salesforce in two months.

The Solution

We created a solution for Zillow's complex business requirements in three steps.

1 Both Trulia and Zillow had separate on-site 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. Our first step was to merge the two ShoreTel systems to create a single-image instance across all Zillow and Trulia sites.

2 Next, we implemented a nationwide ShoreTel Enterprise Contact Center (ECC) system to displace LiveOps and ShoreTel workgroups.

3 Last, we leveraged three different native ShoreTel-to-Salesforce integrations packages to achieve the customer experience results Zillow was striving for.

The Results

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 database to determine the sales rep assigned to the account. If a match is found, the call is immediately routed to the sales rep.

- 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 steps don't find a match, the call is routed 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. This allows the agent to see information about the prospect including previous interactions, sales information, opportunities, etc. The rep can also immediately tag notes to the call and time stamp the call. If the account is not in Salesforce, the rep gets the ability to create an account on the fly and dynamically populate account contact information and activities.

Skills-based and Priority Routing

The ShoreTel system routes 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 vs. 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 bested suited to work these types of customers.

In today's world, customer experience will make or break business success. And at Inflow, we've seen time and time again, the power of integrating data and contact centers make businesses thrive. It's incredible what a little creativity and insight can do when designing, deploying and supporting contact centers. Reach out to a member of our contact center team with your questions. We love to share our knowledge and we've seen just about everything there is to see in the contact center world.

About Inflow Communications

Inflow Communications is a national leader in unified communications and contact centers. With over 80,000 endpoints under Inflow's innovative support plans around the world, Inflow's dedication to knowledge and innovation, and unrivaled customer support, has landed them in ShoreTel's top 2% in global customer satisfaction and as a winner of ShoreTel's coveted Circle of Excellence Partners award.

Inflow was also recently named a ShoreTel Platinum Partner and is their fastest growing partner globally. In addition, Inflow is the only cloud contact center provider in the world that both supports and installs inContact Contact Centers. Founded in 1997, Inflow has offices in Portland, Seattle, Dallas, Tampa, L.A. and the Bay Area.