Finsemble

The Essential Guide to Contact Center Application Integration

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Cosaic

Introduction

Delivering a quality customer experience (CX) while optimizing productivity of contact centers is critical for your business. While investing in omnichannel software platforms is helpful, there are still a multitude of disconnected tools agents rely on. Legacy thick client software, older PBX systems, CRM, CTI software, troubleshooting tools, and ticketing systems are all part of the app overload that slows agents down. The good news? There are game-changing integration technologies out there that can breathe new life into the status quo.

Let's think about the workflow contact center agents are used to. When a customer calls, an agent spends precious time "tab surfing" to find their information while the client has to wait on hold. Or, when the agent receives a help email, they have to search for information, stored in various apps, before they can respond. Additionally, between calls, the agent must toggle back and forth between browser tabs and applications, slowing down service levels and raising after-call work time. Do these scenarios sound familiar?

Time spent toggling back and forth between apps and websites to recall information limits the time you have to do what you do best, deliver stellar service.

Application switching costs more than you think.

According to Harvard Business Review context switching between apps can cause a 40% loss in productivity. Additionally, studies show context switching between apps costs an average $13,000/year per employee. A recent study analyzed nearly 5 million hours of desktop activity of operational support employees, who mostly perform back office work, data entry, or customer support center tasks.

Did you know? It's a Yes! to phone support.

Across the board studies show how much customer support matters. But did you know phone support is still the leading support channel?

According to the Microsoft 2018 State of Global Customer Service Survey:

59%
of respondents have higher expectations for customer service, now more than ever.

95%
indicated that customer service is important to their choice of and loyalty to a brand.

39%
still prefer phone or voice channel with 20% email and 16% live chat not even close.

The evidence is clear. Clients want contact center support now more than ever, and they want their contact center agent to be knowledgeable, quick, and efficient.

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Studies focused on technology and employee productivity show:

Workers switch applications

1,100 times/day

Workers copy-and-paste

134 times/day

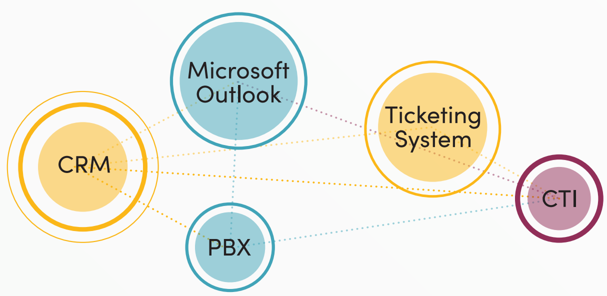
Workers using 30 different applications or more have a

28% higher error rate

than those using fewer programs.

As omni-channel help desks rise, your agents may be connecting with customers via phone, email, web conference, social media, chat, marketing touchpoints, document sharing, and maybe, even direct mail or in-person meetings. It's vital that agents are able to log all of these touchpoints under the appropriate record so they have all the information they need when interacting with customers. While accurate records are of vital importance, manually inputting this information is a huge hindrance to productivity.

By connecting your applications together, you greatly reduce the need to manually add or update records, record interactions, or search for information while you're communicating with your clients.



The solution? Connect all of your existing applications together.

With a more efficient workflow between applications, you can see your KPIs begin to improve immediately.

DECREASE

- ↓ Average speed of answer (ASA)
- ↓ Percentage of blocked calls
- ↓ Call abandonment rate
- ↓ Average time in queue
- ↓ Agent after-call work time

IMPROVE

- ↑ First call resolution
- ↑ Quality of call handling
- ↑ Service level
- ↑ Overall agent performance
- ↑ Customer satisfaction

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As Salesforce is the most commonly used CRM worldwide, we selected it as an integration "hub" that you can use to begin connecting applications. After reading this guide, you'll be an expert on application integration for call centers, and hopefully you'll be on your way to building an integrated desktop environment for your contact center agents. Here's what you'll learn:

Introduction to Integrations

There are thousands of business tools that help with application integration, and they can all be sorted into three main categories.

User Interface Integrations

This type of integration enables users to utilize outside applications within the CRM user interface in records, list views, actions, favorites, and more. User interface integrations improve productivity and make it convenient to use external applications with applications like Salesforce.

Data Integrations

Allow data to be shared between applications pertaining to standardized objects such as leads, contacts, opportunities, and accounts. Data integrations allow all of your company's data to be stored in one, centralized location regardless of its original source. Sometimes referred to as iPaaS, these data-centric solutions are limited to data sharing only, not end-user workflow.

Business Logic Integrations

These integrations enable rules on how data can be created, stored, and changed to be shared across multiple applications. They standardize rules across business applications and are more important for IT personnel to understand than for end-users.

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How to Set up Salesforce Integrations

Linking your Salesforce instance to your other business apps involves an initial time investment for set up, but once the integration is up and running your team will save time by automating tedious manual tasks. The setup process is unique to every app, but we have some general guidelines for how you can get started.

Check the App Exchange

Integrating Salesforce with your other business tools may be as easy as installing an app on the Salesforce AppExchange. This is a collection of ready-to-install solutions that improve the Salesforce experience for different industries, departments, and users. There are thousands of apps in the AppExchange and all are trusted by Salesforce with peer reviews available. This is typically the easiest solution for information sharing between Salesforce and other tools, and we recommend trying this integration method first!

Check Salesforce's Website

You can find instructions for setting up more popular integrations directly on the Salesforce website.

Check the Product's Website

Most products that integrate with Salesforce will have a page with instructions for setup on their website. Try navigating to this page from the site or conducting a quick Google search to locate it.

Use an Integration Platform

Platforms like Salesforce Mulesoft or Finsemble are third party tools for connecting business applications.

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Top Contact Center Applications

Tags

Sales

Customer Service

VOIP

Automation

Communication

Productivity

Prospecting

INTERCOM

Sales | Customer Service | Automation | Communication

Intercom connects sales and customer service teams to prospects through personalized, engaging, professional communication. This real-time business messaging tool goes above and beyond other chatbot platforms with customizable solutions to assist customers quickly and easily.

Through Salesforce integration, contact center agents can set up automatic or one-click lead creation to send client information from chat into Salesforce, eliminating the need to copy and paste. Agents can also create Salesforce tasks from chat communications and automatically log them under the appropriate contact. All chat information will be right at your fingertips so you can pick up the conversation where you left off.

Using prospect profiles from Salesforce, Intercom can trigger automatic communication to ensure every client is presented with the right messaging at the right time. Salesforce data also enables Intercom to funnel clients to the appropriate member of your team by using information such as owner and status.

- Automate client communication with chatbots
- Engage clients with personalized chats including emojis and gifs
- Get clients the help and answers they're looking for quickly and efficiently

Outreach

Sales | Automation | Prospecting

A support engagement platform to make customer support representatives more efficient and effective. Smart sequences guide agents through client interactions to ensure they make contact with the right person at the right time through the right channels. This communication hub also uses machine learning to uncover insights on clients.

By combining Salesforce and Outreach, agents can take advantage of the best of both services. Outreach gives them the tools they need to take action and Salesforce is the ultimate record-keeping tool. Bi-directional sync between the two systems ensures client profiles and activity logs are updated based on the most current information.

- Email, social, voice, and text communication hub between agents and their clients
- Maps out support sequences so reps know exactly how help interactions will take place
- Virtual assistant extracts client information and automatically updates records

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zendesk

Customer Service | Productivity

Zendesk's help desk interface allows customer service teams to interact with clients through their preferred channels, all from one intelligent hub. Pre-defined ticket responses, customizable support forms, and customer search history increase productivity by getting your customers the help they need quickly and efficiently. Customer satisfaction ratings can be pulled into analytics dashboards to help measure and improve the performance of your support staff.

Zendesk's two-way Salesforce integration enables customer service teams to provide personalized support and address client needs quickly and efficiently. By combining these tools, service agents can easily see Salesforce CRM data next to their live support tickets. Tickets can also be created and updated directly from Salesforce.

- Manage customer interactions from dynamic help desk interface
- Get customers the help they need faster with flexible customer service solutions
- Smart performance reporting and analytics dashboards

slack

Sales | Customer Service | Communication | Productivity

Slack is a business communication tool that streamlines internal information exchange for your team. All conversations take place within organized channel groupings, eliminating the need for internal email. Create channels for teams, projects, and/or topics to centralize information and keep everyone in the loop. The searchable archive makes it easy to find information from past conversations.

Slack is the centralized communication hub for many teams and a Salesforce integration makes it easy to find and share valuable prospect information. Once you integrate the two, Salesforce information is searchable within Slack. When a record assigned to a sales representative is changed, smart alerts can be used to notify that rep via Slack. Slack messaging can also be used to update records within Salesforce.

- Eliminate the need for internal emails within your organization
- Keep conversations organized with dedicated channels
- Prioritize important conversations for better focus

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Vonage®

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Vonage is a leading business communication company that provides phone service and cloud storage to SMBs, mid-level companies, and enterprises. If you miss a call, voicemails can be transcribed as text and sent to your inbox. Calls can also be monitored or recorded for easy training and auditing purposes. Vonage can be accessed from your desk or on-the-go from a mobile device.

Connecting Vonage phone systems with Salesforce allows customer service teams to call clients directly from their Salesforce web browser with just one click. This feature can be used at your desk or on-the-go from your phone or tablet. Call tagging and note-taking can also be performed from any device that's logged into Salesforce. All incoming and outgoing calls that match Salesforce records will be automatically logged under that contact or lead.

- Business phone service provider
- Call monitoring and recording
- Mobile applications for virtual teams

DocuSign®

Sales

DocuSign allows businesses to prepare, sign, act on, and manage agreements with business partners all in one place. Much more than an eSignature service, this contract lifecycle management solution includes electronic notarization, government ID verification, guided "wizard-style" forms, payment collection, and much more.

Integrating DocuSign and Salesforce streamlines the client agreement process, saving new business development teams time on manual tasks so they can focus on what they do best. Generate quotes and proposals with the information you already have stored in Salesforce, request signatures with just one click from the Salesforce interface, and add signed agreements to Salesforce records. Combining these services creates a better contract management experience for sales teams, service teams, and customers.

- Electronic agreement management
- eSignatures
- Document generation
- Contract lifecycle management
- Guided forms

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GENESYS

Sales

Customer Service

Automation

VOIP

Prospecting

This cloud-based software centralizes client communication with one, easy-to-use application. Customer service agents can connect with clients through whatever means they are most comfortable, whether that's via phone, email, chat, social, screen shares, or text messaging. Simpler tasks, such as interactive voice response and automatic call distribution, can be automated for increased productivity.

With access to the customer profiles already stored in Salesforce, agents will be equipped with the information they need to provide clients with exceptional, personalized service quickly and efficiently. Genesys can also use Salesforce records to give callers up-to-date information on their case automatically through a self-service IVR application.

Businesses with Sales Cloud accounts can also automatically create Salesforce leads from a call by prompting users to provide information such as name, address, and phone number before they speak to an agent. Call details such as agent, date, time, duration, and call result will automatically be logged under the appropriate Salesforce contact. The system can also prioritize inbound calls for hotter prospects and move them to the front of the queue.

- Cloud-based software for call centers
- Connect with customers via phone call, chat, social, text, or email from one streamlined application
- Eliminate some manual tasks with automation tools

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RingCentral®

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A cloud-based business communications product with flexible solutions for companies of all sizes, from small businesses to enterprises. RingCentral allows you to call contacts from anywhere via phone, desktop app, or mobile app. Monitor and record calls, host online meetings, and connect with customers digitally from anywhere in the world. Plus, RingCentral gives teams analytics and insights to improve performance.

Merging your RingCentral phone service with your Salesforce account makes new business development teams more productive and efficient. From Salesforce, agents can receive client communication with a simple click. Incoming calls will trigger a pop-up with that prospect's information so you don't have to search for it. Plus, you'll be able to log notes, schedule meetings, and create contacts and opportunities in Salesforce while on a call.

- Business phone services
- Connect to from anywhere on any device
- Phone, video conferencing, and internal messaging

G Suite

Sales | Customer Service | Communication

There is much more to G Suite than Gmail alone. This all-in-one collaboration and communication suite allows customer service teams to work faster and smarter. Communicate with clients through Google Hangouts' Meet or Chat products. Google's shareable calendar allows teams to see each other's availability and schedule meetings with clients. Google Drive makes it easy to share files with customers that they can access from anywhere.

Utilize G Suite products and record touchpoints with your clients by Integrating Salesforce with your G Suite account. Sales reps are able to add or update contacts in Salesforce directly from their Gmail account, schedule meetings in Google Calendar from Salesforce, and attach Google Drive files to Salesforce records. By combining the best of these services, you reduce the need to switch back and forth between the two interfaces.

- Gmail for business
- Save & share files on Google drive where they are easily accessible for the whole team
- Schedule meetings and set reminders with Google Calendar

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zoom

Sales | Customer Service | Communication

Meet face-to-face with clients across the globe with Zoom's suite of business communication solutions. Give product support demos by sharing your screen, and host webinars to demonstrate new features for clients. Zoom also offers conference room technology and phone and business IM services.

When you integrate your Salesforce account, you'll be able to utilize Zoom's products right from the Salesforce interface. View upcoming Zoom meetings and start or schedule meetings with just a single click. While you're on a call, it's easy to access contact information that's recorded in Salesforce. Zoom activity history will also be recorded in Salesforce including notes, call duration, and date/time.

- Online meeting solutions
- Webinar hosting
- Enterprise phone system

3CX

Sales | Customer Service | VOIP | Prospecting

A unified communications service for businesses, 3CX offers PBX through cloud-based software or on-premise deployment. With mobile apps for Android and iOS, you can answer calls to your business from anywhere in the world. Video conferencing and chat services are also offered. Plus, 3CX's advanced contact center features allow agents to communicate with website visitors instantly via call or live chat.

When you integrate 3CX with your Salesforce data, inbound calls will automatically trigger a pop-up with the information recorded in Salesforce for that contact. When you receive a call from a new inbound prospect, you can automatically add them as a new Salesforce contact. Calls are automatically logged under the appropriate Salesforce record, eliminating the need for manual updates. Integrating the two services also enables click-to-call directly from the Salesforce interface.

- Cloud-based or on-premise PBX service
- Stay connected everywhere with mobile phone apps
- Live chat and talk to customers on your site

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Office 365

Sales | Customer Service | Communication | Productivity

Microsoft Office 365 gives your team access to the business communication and collaboration tools they need to stay efficient and effective. Outlook provides both email services and shared calendars so you can schedule meetings with clients and always know the availability of your team. Files can be accessed and shared from any device through OneDrive. Plus, you'll have access to Microsoft's essential suite of Office apps.

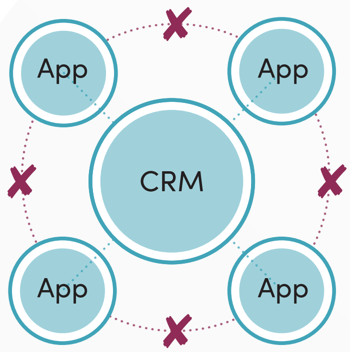
The Salesforce-Office 365 integration brings Salesforce contact information into the Outlook interface, reducing the need to toggle between the two systems. Sales reps can view Salesforce custom object information in Outlook when emailing a contact. With a simple click, emails and appointments can be added to Salesforce from Outlook. Sales reps can also manage Salesforce tasks, craft emails from Salesforce templates, and create new custom objects within Outlook.

You rely on countless tools to run your business, all of which you use to streamline operations, boost productivity, and increase efficiency. But when all of your information is stored in different platforms, manually adding it to Salesforce can actually slow business operations down instead of making them more efficient. Salesforce app integrations address this pain point so you can spend less time searching for and inputting contact information and more time selling or helping customers.

- File storage and sharing with OneDrive
- Outlook business communication & calendar tools
- Microsoft Outlook, Word, Excel, PowerPoint, Publisher, and OneNote

Finsemble: The Best Solution for Connecting Apps

Integrating your business tools with Salesforce is a huge timesaver, but any of the external applications that you integrate with Salesforce will still be siloed from one another. Unless your contact center team is only working with one external app, they will still have to toggle between Salesforce and other applications to complete their day-to-day responsibilities.



Without Finsemble, your CRM is the hub.

FInsemble allows connections between all your applications.

While integrations allow apps to share information and functionality with Salesforce and vice versa, integration through **Finsemble enables your external apps—no matter what type—to communicate and work with each other**. This unique capability allows you to maximize the potential of your existing tools and make the most of your Salesforce investment.

And yes, Finsemble is compatible with all of the tools listed in this guide and more.

Here are some of the ways customer service teams revolutionize their workday with Finsemble.

Share data between apps with a simple drag and drop feature

Selectively share information between apps for a full understanding of context at a glance. Automatic sync can be enabled between a group or all apps.

Group apps together into one view

See information on a particular contact from all your apps without toggling. Saved views are customizable and are automatically synced to keep up-to-date client information readily available in one, centralized location.

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Look for information in multiple apps with one search
Stop looking for information on different sites. Search for and launch specific apps, views, and data with no tab surfing required.

Create workflows with touchpoints from multiple apps
Trigger a series of predefined workflow actions to automate the visibility of contextually-relevant customer and prospect data to take real-time action.

Sound like a lot? It is! This all-in-one integration platform is a game changer, connecting all of your business and customer service apps into one easy-to-use browser. It allows all of your business applications (whether it be SFDC, Ringcentral, Outreach, Slack, etc.) to speak with each other and give contextually-relevant information right when you need it.

Improve your metrics. Create smooth operators.

With confident agents, delighted customers and optimized productivity with connected applications, you'll see your reputation growing as a CX leader. Finsemble for contact centers is what you need to improve your KPI immediately.

DECREASE

- ↓ Average speed of answer (ASA)
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- ↓ Agent after-call work time

IMPROVE

- ↑ First call resolution
- ↑ Quality of call handling
- ↑ Service level
- ↑ Overall agent performance
- ↑ Customer satisfaction

Are you ready to begin your application integration project with Finsemble?

Schedule a demo to learn more!

About the Author
Dan Schleifer, Cosaic Co-founder and CEO

Dan has spent his career building and taking to market enterprise software solutions in the information security, sales enablement, and financial technology markets. With a huge passion for data visualization, he founded Cosaic to bring data viz and modern design to capital markets technology.

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