

EXECUTIVE BRIEF

GET MORE FROM YOUR CRM

With Unified Communications integration



Our partnership
with clients is
the most important
connection we make.

Spectrum
ENTERPRISE

The CRM integration capabilities of Spectrum Enterprise Unified Communications with Webex close the circle between contact management and unified communications.

Customer relationship management (CRM) software has been helping companies to become more productive since the mid-eighties, but even today many companies fail to use it to its full potential. An excellent tool for organizing customer data, CRM software has been difficult to integrate with communication systems.

The CRM integration capabilities of Spectrum Enterprise Unified Communications (UC) with Webex change that by closing the circle between contact management and unified communications. The solution integrates the two to improve the customer experience and help share knowledge internally. This executive brief describes how integrated unified communications and CRM works, and how it delivers better customer experiences.

It's time to rethink customer experiences

To excel in a competitive marketplace, business leaders need to drive better customer experiences. To do that, they must cater to a rapidly evolving set of customer needs.

Customers are looking for more meaningful relationships with the companies with which they do business. They want brands to better understand them. In its 2019 Customer Experience Excellence report, KPMG found that personalization was a key driver for customer loyalty in 18 out of 20 markets.¹

Busy customers are also less patient ones. In the past, customers may have begrudgingly waited for service, sitting on hold in a contact center queue and then waiting while employees fumbled to find the relevant information. They grew accustomed to the most frustrating problem of all: repeating themselves to employees who had no record of their past interactions.

Organizations cannot afford to leave their customers waiting or feeling unheard. Customers want shorter, smoother interactions. PwC found that efficiency and convenience topped the list of customer demands, followed closely by friendly and knowledgeable service.²

The bottom line is that customer expectations are rising around the world. All countries that KPMG researched for its report have seen an uptick in their customer experience ratings, indicating that they're investing in improving the quality of their customer experiences. Those companies that don't work to improve their customer interactions risk losing market share. According to PwC, one in three customers will walk away from a brand they love after just one bad experience.³



Challenges for organizations

CRM systems can help solve these problems. However, organizations face several challenges as they try to apply CRM to meet customer demands, including: poor customer visibility, data entropy and too many databases.

For many companies, CRM data is often scattered around departments, sometimes in different systems, which makes it difficult for employees to get a single, unified view of the customer.

Those seeking to solve that problem face another issue: data entropy. Staff don't always update CRM records after each interaction. Without rigor, the company's view of the customer degrades over time. Their picture of the customer stops reflecting reality and becomes inaccurate.

Another challenge for companies is the complex, disconnected mixture of tools that they use. Employees juggling separate phone systems and CRM systems face 'swivel chair syndrome,' forcing them to switch between one tool and another. This makes it difficult to answer customer inquiries while simultaneously searching CRM databases.

Customer relationships are built on positive interactions, so this disconnect between CRM and communications services is damaging to customer service. Luckily for business leaders, it is easier to fix today.

Spectrum Enterprise UC CRM Integration offers a range of features that maximize employee productivity while delivering new levels of personalized customer service.

Introducing CRM integration

With cloud-based UC and CRM integration, it is possible for your UC service and CRM system to easily exchange data. This creates a wealth of new opportunities that can have a positive impact on business results.

Better customer service – CRM integration enables the UC service to share the customer's telephone number with the CRM system at the beginning of a call. The CRM service can use this to automatically look up customer data so that the employee doesn't have to do it manually. This creates a seamless, customer-centric experience. The customer no longer has to wait for the employee to find their information.

Personalized customer experience – Having customer data at their fingertips gives the employee the information they need to personalize customer service. Customers feel heard and understood.

More sales opportunities – Better informed employees and happier customers mean improved up-selling and cross-selling opportunities.

Increased customer intelligence – The CRM system automatically logs customer interactions and allows employees to provide additional information. The more you use this system, the more intelligence you build up about the customer over time.

Streamlined operations – CRM-telephony integration empowers teams to get more done in less time. They can contact customers using click-to-call capabilities from within the CRM application.

Spectrum Enterprise UC CRM Integration

Spectrum Enterprise UC CRM Integration is a connector that uses APIs (interfaces that allow cloud applications to talk to each other) to create a seamless link between its UC service and your CRM system. It supports the most popular CRM systems: Salesforce, Agile CRM, Microsoft Dynamics, Zendesk, Zoho and Sugar CRM. It offers a range of features that maximize employee productivity while delivering new levels of personalized customer service.

Contact search

Spectrum Enterprise UC CRM Integration begins with the contact search process. When a customer call comes into a company's office, the incoming telephone number is sent to the company's contact systems. Contact search not only searches the CRM system for appropriate contact data, but also searches your company's phone lists for information, along with personal contact directories and Microsoft Outlook systems. That's a powerful feature because it empowers companies to get the most out of all available contact data. The ability to harvest data from both internal and external systems provides precise intelligence about all incoming callers. And it ensures that you're capitalizing on your investment in your CRM and enterprise directory products.

Call log entry

Spectrum Enterprise UC CRM Integration enables the CRM system to log calls automatically using information delivered directly from the UC system. It journals all inbound and outbound calls automatically so that employees can review a customer's complete call history accurately. They can tell when calls happened, and which employee handled the call. Employees can augment these automated logs with their own manual notes, explaining what was discussed on the call.

This feature makes the CRM system a single, reliable source of information that accurately reflects the customer's current situation. Combined with screen pops, this gives the employee an up-to-date picture of the customer's status,

Hosted Call Center with omnichannel agent interface showing CRM log entry.

The screenshot shows a CRM interface with a top navigation bar containing various icons for user management, call control, and system settings. Below the navigation bar is a 'My Statistics' table with the following data:

Name	Tweets Received	Tweets Answered	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Emails Received	Average Talk Time	Callbacks Answered	Web Chats Received	Email Average Answer
Production Streams	0	0	-	-	-	-	0	-	0	0	00:00:...
ABC, Co. Live Streams	0	0	-	-	-	-	0	-	1	2	00:00:...
Holiday Cruises	-	-	0	0	0	00:00:...	-	00:00	-	-	-
ABC, Co. Sales	-	-	2	1	1	00:00:...	-	00:12	-	-	-
	0	0	2	1	1	00:00:00	0	00:06	1	2	00:00:00

Below the table, there is an activity log with the following entries:

- Activity: Web callback, From: John Smith (Zoho CRM Contact)
- Activity: Web chat, From: Sandy Sanchez (Zoho CRM Contact)

An 'Add activity log entry' dialog box is open, showing the following text: 'Call to Mike. He placed an order for \$4725. Follow up email sent. Schedule order and call him on Tuesday June 8th.' The dialog also includes a checkbox for 'Close log entry immediately' and buttons for 'Show CRM Contact', 'Cancel', and 'OK'.

ensuring that they don't miss any important past interactions.

Click-to-dial

Spectrum Enterprise UC CRM Integration doesn't just make employees more effective when handling incoming calls. Its click-to-dial feature gives them everything they need to initiate outbound calls quickly and smoothly. It enables them to control the telephony system from the CRM software so that they can dial hands-free by simply clicking on a customer's number. It's a great solution for faster, more efficient outbound sales campaigns. Not having to dial customer numbers saves valuable seconds with each call that accumulate quickly, leading to significant productivity savings across multiple employees over time.



Implementation

In the past, integrating CRM and telephony systems was a daunting challenge that required a significant investment in time and expertise. Spectrum Enterprise UC CRM Integration solves that problem in a single-vendor solution that is simple to implement. After purchasing the CRM add-on license, administrators can select their CRM application from a drop-down menu in their UC settings. After entering their credentials and a few mouse clicks, the integration happens entirely in the cloud. That means no on-site disruption, no capital expenditure on extra hardware, and nothing extra to maintain in the contact center.

Conclusion

CRM has already improved productivity for thousands of companies, but it has had its shortcomings. Now, CRM-telephony integration represents a way to capitalize even more on your customer data with a minimal investment. It's a quick win for businesses — a simple implementation with lots of potential to improve customer service and boost customer satisfaction ratings quickly.

[Learn more](#) about the Spectrum Enterprise Unified Communications solution.

1. ["Global Customer Experience Excellence Report, 2019,"](#) KPMG International, 2019.
2. David Clarke and Ron Kinghorn, ["Experience is everything: Here's how to get it right,"](#) PwC, 2018.
3. Ibid.

About Spectrum Enterprise

Spectrum Enterprise, a part of Charter Communications, Inc., is a national provider of scalable, fiber technology solutions serving America's largest businesses and communications service providers. The broad Spectrum Enterprise portfolio includes networking and managed services solutions: Internet access, Ethernet access and networks, Voice and TV solutions. Spectrum Enterprise's industry-leading team of experts works closely with clients to achieve greater business success by providing solutions designed to meet their evolving needs. More information about Spectrum Enterprise can be found at enterprise.spectrum.com.

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