

# Salesforce® and Vonage:

The perfect combination  
for service



# Resolve Customer Issues Faster, with Better Engagement to Deliver Greater Satisfaction – and Win the CX Battle

If you're in business to win, you need to compete and win the Customer Experience battle. Even back in 2017, Gartner's survey of CX leaders showed that 81 percent of them believed they would be competing mostly or entirely on the basis of CX by 2019. Dimension Data found that 9 out of 10 organizations saw CX as a critical differentiator.

To deliver great CX, you need to master your customer data. Customers remember their conversations with your business – and they expect your business to remember them, too. That means all data from all channels is vital to CX. Yet, according to the Dimension Data

study, only 8.4 percent of companies have all their customer channels connected. By investing in Salesforce®, you've taken a major step toward capturing the important data about your customers. This paper will illustrate how Vonage Contact Center for Salesforce takes that investment to the next level by integrating your communications platform and the data it captures with your customer data in Salesforce to provide personalized, exceptional service.



# Introducing the Players: Salesforce and Vonage



## Salesforce, the customer success platform

If you've invested in Salesforce, you already know it's the world's leading cloud-based CRM platform. With its own community of partners and technology providers on the AppExchange®, Salesforce offers its customers a complete "Customer Success Platform." Organizations can "plug-and-play" a massive range of technology into the platform to help them transform their operations - from sales and service to finance and marketing, and everything in between.



## Vonage Contact Center for Salesforce

Vonage Contact Center for Salesforce is a powerful Salesforce solution, integrating seamlessly and natively right down to the custom objects in your individual instance. Available from the AppExchange today, it's revolutionizing the way businesses engage their customers.

Vonage Contact Center for Salesforce comes in two distinct packages:

**Sales** – helps you find new customers more efficiently and improve your sales operation.

**Service** – helps you serve existing customers better by offering personalized service.

We'll focus here on how the combined power of Vonage and Salesforce is enabling organizations to deliver exceptional service. Used in tandem, Salesforce allows you to do things with your contact center you never thought possible, and Vonage Contact Center for Salesforce allows your CRM data to have a direct, immediate and powerful impact on customer service, loyalty and CX.

Integrating your communications platform with your Salesforce data provides significant benefits across your service department. Syncing customer data and communications makes it easy to offer personalized and differentiated service. It reduces customer effort and improves CX, driving customer loyalty and dramatically improving NPS and CSAT scores.

## Things Salesforce and Vonage can do together

Combining the customer record and its wealth of information in Salesforce with Vonage Contact Center for Salesforce's advanced communications capabilities allows you to use data as a trigger. The caller's phone number is associated with the customer record and the data in that record tells the Vonage platform about the caller's history, preferences and service priority level. Instead of making the caller wade through an IVR menu, the caller is connected immediately to the agent best able to help, and the agent has information about the customer automatically displayed on his Salesforce interface. Here's what those features look like in action.



# Dynamic IVR/ intelligent routing

## Priority routing

When your key customers call, automated priority routing sends them immediately to the right agent and to the right point in the queue. Priority customers will not need to wait for an agent; the platform recognizes the customer, prioritizes the call and moves it to the front of the line.

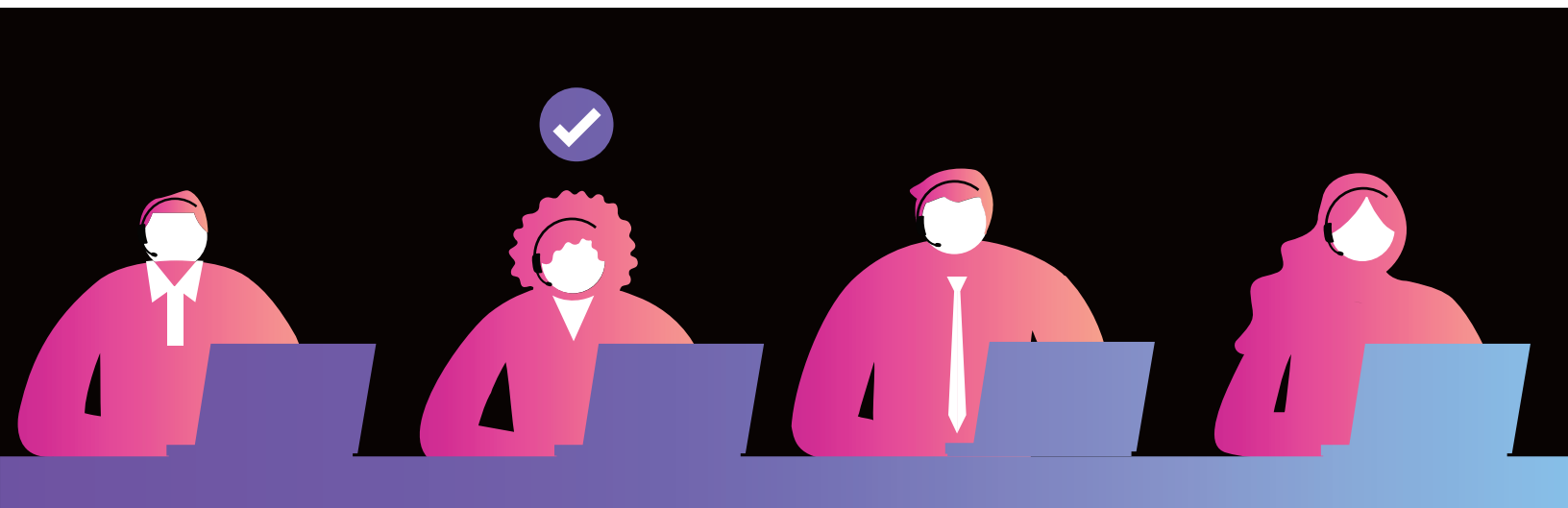
## Dynamic routing

With each call, the caller's phone number is associated with customer data within Salesforce to intelligently route it based on any data changes in the Salesforce customer record and the platform automatically sends the call to the most appropriate agent. For instance, if a customer has given a low rating on a post-call survey, they can be routed to a specialist group who are selected, trained and empowered to resolve issues quickly.



## Improved self-service

Give power back to your customers by giving them easy self-service options in the IVR, meaning they don't have to speak to an agent if they don't want or need to for commonly asked questions or answers to basic queries. An added benefit is that self-service options can be made available 24x7 at no cost.



# Screen pop customer records

## Empowered agents

Give your agents advanced warning of the context for the call as it arrives and enable them to deliver personalized greetings to your customers.

## Reduced customer effort

Giving your agents advanced warning of the nature of the call means they can help customers faster. It removes the need to constantly ask for your customers' reference numbers, and allows agents to get started on helping customers instead of having to put the customers through the frustration of explaining their problems multiple times.

## Improved first contact resolution

Intelligently routing and screen popping records helps agents resolve more calls the first time. Not only do your customers get to the right agent immediately, but that agent knows why they are calling, shaving seconds off of every call.



# Simplify the challenge of omni-channel

Salesforce does a fine job of pulling together data from a wide variety of digital sources - email, text, social media, chat and others. With Vonage Contact Center for Salesforce, data from calls to your service team are added to the mix - meaning that these vital conversations, which come at moments of truth for customers, can be included in the customer record to provide a complete and truthful picture of your relationship with that customer.

## Universal queue

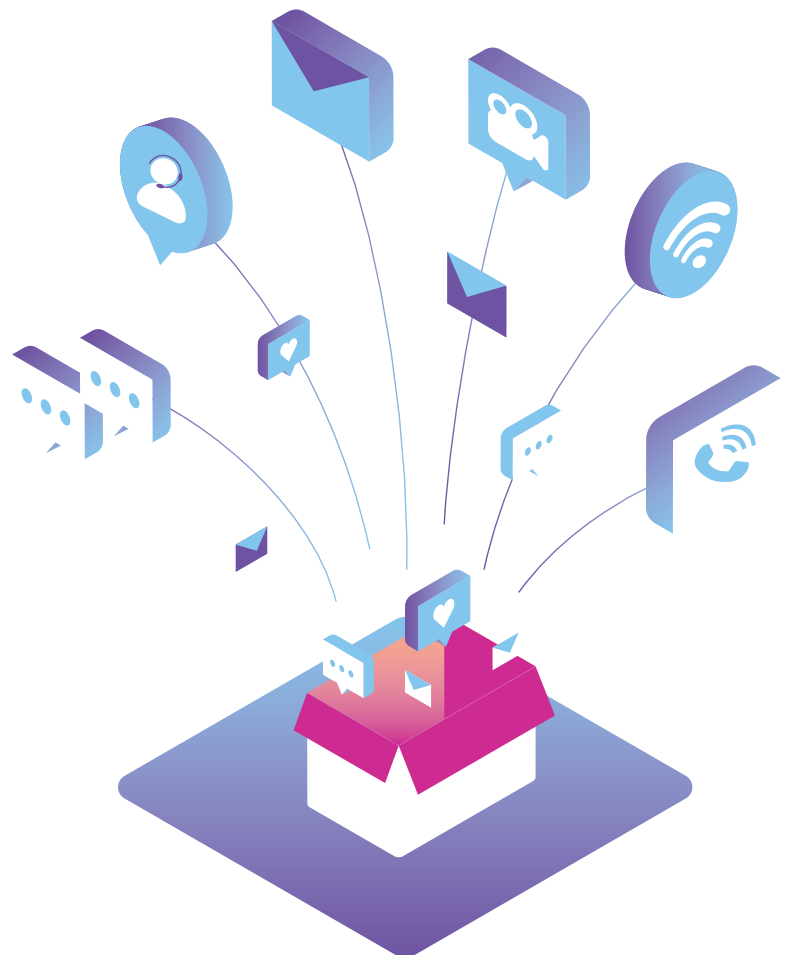
Instead of handling different channels in silos, bring all your inbound channels together into a single queue. This helps prioritize key channels and contacts and makes reporting simpler, and it helps make the CX more consistent across channels. This will also improve agent productivity by enabling them to multi-task and work on calls, email responses, chat, and other channels simultaneously.

## Dynamic and skills-based routing

Regardless of the channel, understand the customer's context and use the data in the CRM customer record to direct every message to the best possible agent.

## Real-time service level analytics

Using Vonage Contact Center for Salesforce you can view real-time service levels across channels and ensure that SLAs are met for all channels.



# Implement gamification to boost performance

Motivating your service team to use their tools is the key to capturing every bit of vital data. Encouraging them to use those tools the right way is key to getting the most from that data. Vonage Contact Center for Salesforce has gamification tools available to make it fun and easy for your team to learn the right behaviors.

## Emulate best practices

Before you can encourage the right behaviors, you need to know what those behaviors are. Combining the data inside Salesforce and Vonage Contact Center for Salesforce enables managers to identify key behaviors and activities that drive improvements in service levels, and replicate them across the entire service department. For instance, call recordings of a top performer can be shared with other agents as part of new starter ramping and other training initiatives, helping to raise the standard of the entire contact center. Taking things a step further, Vonage Contact Center for Salesforce's speech analytics solution, Conversation Analyzer, automatically transcribes all calls. This makes it easy to identify both good and sub-optimal experiences, assess compliance and product knowledge, and take corrective actions where needed.

## Boost productivity

Rewarding and replicating best practices and continually refining your processes can significantly boost productivity and performance, even as objectives and KPIs change.

## Drive Salesforce Adoption

The biggest hurdle to realizing ROI from CRM is adoption. Gamification with Vonage Contact Center for Salesforce drives Salesforce adoption, since it incentivizes and rewards effective use of CRM.





# Improved management information

In the past, service delivered via the contact center and service delivered through digital channels have been siloed, making management difficult and creating inconsistent service experiences for customers who today expect a unified experience from the companies they buy from. By improving access to information, managers can understand the service experience in its totality and make better decisions to optimize the service experience.

## Improved reporting and decision making

Use your choice of ready-made or custom-built reports and dashboards to give you access in real-time to vital management information, providing comprehensive reporting to uncover business insights, making it easier to reach data-driven decisions.

## Complete visibility

The biggest killer of CRM ROI is a lack of adoption. With Vonage Contact Center for Salesforce, all activity is automatically logged in Salesforce, meaning you now have a real-time, complete view of what's happening in your service operations, regardless of geography.



# Enhanced mobile service and reporting

Agents are no longer tethered to contact centers – they may take calls at home, or even while on the road through mobile applications. Guaranteeing a consistent customer experience even when agents are working in a variety of ways requires a powerful platform that can mirror the ways your agents work and at the same time provide visibility into agents' actions for managers. This can also be a real motivator for agents, while also attracting talent that may not live near your contact center locations or who have commitments that require them to work from a home office.

## Real-time visibility for mobile agents

With mobile agents incorporated into the Salesforce and Vonage Contact Center for Salesforce platform, you now have complete visibility of their activity, whether out in the field or at their desk.

## Remote management

Your agents can all be managed as a single group no matter where they're based or how they use the platform. Through Salesforce and Vonage Contact Center for Salesforce, all your agents appear to managers as though they're in the same location.

## Simple business continuity and disaster recovery

Switching delivery of calls from contact centers to mobile phones in the event of an emergency can be done rapidly (about the time it takes to write down the number), so if something terrible should happen, you can be up and running again in next to no time.

## Cost saving

Mobile data usage is only needed for the initial click-to-dial, then the call is made from Vonage Contact Center for Salesforce. None of the agent's mobile internet or call allowances are used. This can add up to enormous cost savings, particularly if calling internationally, no matter who pays the mobile bill.



TO SUM UP...

If you're competing based on customer experience – and you are, whether or not you realize it yet – the impact of service can't be underestimated.

It's where your customers depend on you in their real moments of truth. Handled badly, and service won't just cost you customers – it'll create a toxic word-of-mouth that will prevent potential customers from considering you and contribute to a downward spiral. Handled well, and the opposite happens – satisfied customers stay and are more profitable, and the things they tell their peers can lead directly to more sales.

To do that, you need your contact center to draw from all your customer information to make every service call fast, effective and personalized. The only way to do that is to integrate your contact center solution with your customer data – in other words, to team your contact center functionality with the powerful data collected within CRM.

## Next Steps

