

WHITE PAPER

How to choose the best CRM implementation partner for your call center

INTRODUCTION

In the era of multi-channel communications, the Service Management and Customer Support features used in Call Centers, along with the Sales Force Automation (SFA), are among the most common functionalities of a Customer Relationship Management (CRM) solution. Very often, the call center runs using an Automated Call Distribution (ACD) solution without integrating it with a CRM solution. The growing number of call centers on numerous market verticals proves that call centers have become more complex, with a more diverse customer base and with particular needs regarding customer management as well as with multiple products and multiple marketing channels to manage.

Integration is also important, as a call center solution needs to bind together multiple systems such as ACD, CRM, Financials, and other business specific systems.

This white paper aims to provide you with answers on how to choose the best CRM implementation provider for your call center, what the main functions of a good CRM for call centers are, and what benefits your business will derive from integrating its call center with a CRM solution.

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Reasons to have an integrated call center solution

Perhaps the main reasons to integrate CRM solutions with your ACD and other IT systems in your call center would be the fact that major operational savings can be achieved, as well as greatly improved customer satisfaction. Companies achieve this by routing the right customer to the right customer service representative (CSR) as well as providing the CSR with the appropriate information all the time.

A Customer Relationship Management (CRM) application can offer various solutions to handling customer concerns. In terms of understanding a company's consumer base, a CRM call center solution should provide only relevant information to customer service representatives, as to minimize information clutter and provide the CSR with the right tools to solve the particular problems presented to them. Furthermore, the CRM, as well as the entire IT infrastructure, should simplify the nowadays more and more complicated tasks of a CSR.

Without continuity in the business process, investing in a call center without CRM will bring a limited return and will not fully capitalize on customer data. Very few customers are happy with the quality of a call center's services, because of the dissipation of information into different systems that do not provide the CSRs with a unitary image of the client.

The CSR will have to find out from the client a lot of information that could have been made available to him by the sales team. In case an up-sell opportunity appears, the sales team will not know how to address the needs of the existing clients, because those needs are available only to the service & support team. The marketing team will not be able to structure campaigns on some client segments, because the data it needs are stored at the sales or support team. **All these discontinuities in the internal communication flow of a company are extremely damaging, and can be best overcome by integrating a CRM solution with the ACD solution of a call center as well as with the other IT systems.**

A recent study from the IT market research company Gartner confirms the importance that companies should give to their Customer Support department. Although critical to success for most enterprises, the customer service center is undervalued by most business leaders, according to Gartner Inc. This lack of priority is reflected in underfunding of the customer service function and often results in the company's failure to remain competitive. One of the most relevant examples is Dell, when they outsourced their Customer Support department without really analyzing first the impact and without a clearly defined Customer Support plan in place. The impact on the customer experience was significantly negative, as clients didn't benefit from specialized assistance in foreign languages, and the waiting time over the phone was extremely long. After a failed experience with an offshore provider, Dell moved its outsourced jobs back to the United States.

Gartner¹ has identified four key areas that contact centers need to focus on to create a higher impact at lower costs, among which this is particularly linked to CRM: **better contact center application design**. Younger CSRs expect a more compelling, responsive and intuitive CRM interface to match the experience with the consumer applications that they take for granted. The research company predicts that consumer applications will extend to the desktop, as well as the website, to the point where smaller, less-formal customer service centers will be able to look at Web 2.0 technologies that enable common technologies (such as Facebook) to be used as the agent desktop. They will integrate the necessary telephony components and business information with these "gadgets."

Until then, the implementation of a call center without a CRM solution significantly decreases the value that it brings to the company. CSRs, whether handling inbound or outbound calls, must benefit from a solution that can collect relevant data for the customer interaction, and manage telesales campaigns or clients' complaints.

Furthermore, while **email** has its numerous uses, it **cannot compete with a CRM solution that can integrate inventory data with customer tastes and preferences, history of purchases and supplemental products**. In this case, an email may tell the CSRs what is available, but it will do little to educate them on what they should offer and to whom.

Main functions of CRM solutions for call centers

Detailed information on the client – such as the number of calls he made to the customer service department, the call status (the result of the conversation), the exact day and hour of the call or the name of the CSR who took the call - are vital for a good customer relationship experience. Most CRM solutions for call centers offer a wide range of functions that ensure integration with all business departments, and provide valuable insights on the status of calls.

The main features of a CRM solution for call centers include:

- **Configurable workflow**, such as assigning the person responsible for each step in the flow and the treatment for expired tasks;
- **Integration with ACD systems**;

¹ <http://www.gartner.com/it/page.jsp?id=927613>

- **Open APIs** that allow other systems to pull and push data to and from the CRM system;
- **Development tools** that allow full customization to processes and work flows;
- **Business Integration** makes sure Help desk, Call Center, Sales, IT bug tracking, Quality Assurance, and even Research and Development can leverage the power of team collaboration and gain a complete view of the customer;
- **Contact objective and history**, which makes customer management and analysis easier;
- **Outbound management sub-system** enables companies to setup and manage a campaign with call list generation, job distribution, interface design, call process monitoring and reporting;
- **Monitoring system** that provides system wide management capability, such as monitoring agent status, queue status and special business target (can be found in the ACD solutions as well);
- **Reporting system**, meant to export data in Excel format with customer-defined criteria and format. Graphical statistical reporting is also available with some CRM solutions;
- **Automated disaster recovery** that enables call centers to continue serving customers even when the network goes down, with a built-in automated offline mode;
- **Collaboration with the sales team**, by means of automatic email notifications sent to a mobile sales representative, for example;
- **Campaign management** that can be empowered with product pictures, customized link drop-down lists, and complete campaign details;
- **Rapid response CRM** offers the possibility to upload or download files and continue working, to navigate to a new screen without losing information, and even to edit right inside a field without opening it;
- **Real-time dashboard** ensures companies that their CSRs never miss a call-back or have a ticket go overdue (also provided by the ACD system);

- **Knowledge management** systems provide access to product details, brochures, links to companies' intranet and information about product recalls and how to instructions;
- **User friendly interface** meant to bring information on hundreds of transactions into full view;
- **Remote access**, offered anytime, anywhere, without any requirements for Internet. If the CSR is mobile, there is no need to synchronize, the CRM will automatically update information whenever an internet connection is available;
- **Customer web portal** reduces overall labor costs by staffing to meet the needs of an online queue, versus a telephone queue. This feature significantly reduces calls that relate to simple product information and administration questions. Customer can also open a customer service case online directly and follow-through to completion;

Benefits of CRM for call centers

Call centers have evolved into sophisticated operations where a single component, the call center CRM, can play a crucial role. Call center CRM, when properly leveraged, can provide a competitive advantage for a call center organization looking to differentiate itself from the competition.

- ✓ **A call center CRM allows callers to be intelligently routed to CSRs** based on a series of customer handling rules - for example, the customer's tenure, profitability, status, etc. Along the same lines, key information may be captured and provided to the CSR, so that the customer does not have to re-explain his/her situation each time a new call center agent becomes involved.
- ✓ Another benefit of a call center CRM is the **CSR's access to multiple databases relating to the customer's current and previous transactions**. If a caller has a question about purchasing, billing, or any other topic, the caller will be routed to the right agent and the agent can easily look at the various records without having to transfer the call to a different department. Having a complete view of the caller's situation and past activity can greatly cut down handling time, as well as improve time to resolution.
- ✓ Aside from helping make transactions more efficient, a **call center CRM can help boost revenues**. After a customer's issue has been addressed, the CSR has the necessary tools to better understand the customer's needs and possible up-sell or cross-sell opportunities. Having a complete view of the

customer's history and other details can reveal key information that can be used to suggest relevant products and services without turning the call into a hard selling attempt.

How to choose the right CRM implementation partner for your call center

Like any major software purchase, CRM software for call centers requires that potential buyers begin the process with a clear set of requirements. You should put together an extensive list that includes not only the functionality you will need at the first stages of your business, but also takes into account what you anticipate your company will need in the future.

The best way to start is to take a list with all the features, a CRM matrix if you want and check all those that apply to you. Then, using this CRM matrix, start a research stage where you should find all the CRM providers that have all the features that are interesting to you.

Once you've made up your mind to begin exploring your options, **schedule demos with different vendors and speak with customers using the software.** For some organizations, a hosted CRM solution will make the most sense; for others, an on-site application will be necessary. Remember: there is no such thing as the perfect CRM solution, just the perfect CRM application for your business. **Choosing the right call center CRM can help manage information, improve customer service and boost staff productivity. Also a very important point is to consider that it is not the CRM manufacturer that actually provides the implementation services, but an implementation partner of it. So it is important that you feel comfortable with these partners.**

These are a few **factors** to take into consideration **when choosing the CRM for your call center:**

1. It's user friendly

You must make sure that you acquire a CRM solution with a GUI based administration that is intuitive and provides self-sufficiency. When you spend a great deal of money on a call center application, you have to be sure that, in order to create new queues, change call flows or generate announcements, you don't need to hire professional services to complete the task for you in a couple of weeks.

2. It provides APIs to integrate with your other IT systems

Converged environments are efficient environments, so being able to easily and economically integrate your call center operations your back office systems (CRM, order entry, custom routing, etc.) provides most businesses with 3 major benefits:

- Cost Savings;
- More earnings by cross-selling and up-selling;
- Improved customer experience.

You will get faster, better ROI if you acquire a call center application built to open standards, and that can provide the Software Development Kit, to customize call activity to your business rules.

3. It easily integrates with your preferred ACD solution

Automatic call distribution plays an important role for a call center, as it ensures the best available employee responds to a given incoming call.

4. It offers callback functionality

Clients are not too happy to wait on hold. Instead, callers can have CSRs call them back at their convenience, not at the company's convenience. Offering the caller the option of receiving a call back, while still maintaining their position in queue, is a key differentiating factor.

5. It's integrated with the Interactive Voice Response (IVR) system

An IVR (Interactive voice response), which is a feature of the ACD, can pull caller information from the company database, or CRM system, to present to the caller. The caller has his needs met and the company does not have to employ extra staff to provide readily available information. Sometimes customers want simple, day-to-day information that does not require agent handling.

6. It can grow with your business

Choose scalable software that will see you through from an incipient stage to a large enterprise.

7. It is extensible

It is easy to develop custom modules and implement custom workflows, in other words, it is extensible.

8. It provides the ability to reinvest in research and development.

It is important to ensure that call center software is up-to-date with the latest contact center functionality. If you have discovered new ways to use your software, make sure you work with a vendor that consistently reinvests in technology and new functionality. In the end, you profit and so does your customer.

CRM implementation partner - Short checklist

One major factor in choosing the CRM solution is to have a dependable partner that will help you implement and evolve the CRM Call Center Integration. In choosing **the right CRM implementation partner**, here are a few **points to consider**:

- ✓ **Your implementation partner should help you run your systems according to your business needs** and minimize, as much as possible, the number of situations in which business processes have to be run to suit the software.
- ✓ **Look up things such as past implementation success rates** for that tool and attributes that an integrator should possess to ensure smooth and on-time deployment. Consider your integrator's track record. If you are considering a CRM deployment, it's likely that it aims to solve a business issue. It could also be customer retention, lead management or adding to the customer base. Work with collaborators that have had success in managing deployments in your industry under similar circumstances.
- ✓ Implementation experts and consultants are available at a fixed fee or on a time-related fee structure. If the implementation experts and consultants are two different parties, get them to agree on the way forward so that deployment can happen in a time-bound manner. **Your collaborators should be willing to help you with issues that may arise after the key deliverables have been achieved.**

- ✓ **You should have prior information on the personnel that will be deputed for your project.**
Get to know the people involved. This will help in discussing deliverables and arriving at a strategy that will help achieve the deliverables.
- ✓ Last but definitely not the least, **have them sign an SLA** (Service Level Agreement), as you need quick turnaround time and they need to be able to adjust fast according to your business needs.

Conclusions

Not investing in a solid CRM Integrated Call Center solution can carry a large cost in lost sales and dissatisfied customers. In addition, selecting a poor channel of communication, like email, to disseminate product and procedural information does not position agents for effective or efficient interactions with customers. Without a real integration of all the data available on a client, companies can either say they provide «customer care» or an efficient after sales service.

A call center CRM system is a great tool for companies looking to be more effective and efficient in handling their customers' inquiries and requests.