



# Salesforce and VoIP:

## 9 Business Benefits of Integrating Your CRM with Your Hosted VoIP Phone System

185 DEVONSHIRE STREET, SUITE 700 | BOSTON, MA 02110



## **Salesforce and VoIP: 9 Business Benefits of Integrating Your CRM with Your Hosted VoIP Phone System**

In the fierce landscape of business, every organization is looking for a competitive edge to remain healthy and relevant within their respective industry. For millions of companies of all shapes and sizes, that competitive edge has been a revolutionary, customer relationship management (CRM) software called *Salesforce*.

Founded in 1999, Salesforce offers a platform to sell your products and services while ensuring great customer service follows a sale. Because it is considered “software as a service” (SaaS), companies can use a single, scalable platform that is easy to customize and upgrade as the needs of the business change. As of early 2016, it is one of the most highly valued American cloud computing companies, meaning many companies are continuing to adopt the software and utilize existing implementations to deliver more ROI at their business.

With more and more companies using Salesforce as their CRM in conjunction with the growing customer demand for extreme access and high touch service businesses are now looking for a competitive advantage within their Salesforce CRM and they’re finding that advantage by integrating Salesforce with their phone system.





## Why Integrate Salesforce With Your Phone System?

A phone system is a critical part of any business. Whether it's a single point of contact or a network of employees and call centers, having an easy way to communicate with your customers is crucial to success.

Because a phone system is used to communicate with customers in a variety of ways from making new sales, delighting existing customers and supporting customers who have any issues, you can integrate Salesforce to make these interactions more meaningful and more efficient.

By making your business phone system a tool in the Salesforce toolbox, you will empower your employees to deliver an exceptional experience to clients, colleagues and prospects alike. True native Salesforce integration will automatically layer powerful functionality on top of the most powerful CRM platform in the world.

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# THE 9 KEY ADVANTAGES



## ADVANTAGE 1 Record Matching!

### Streamline, Simplify and Personalize Customer Experience

Every call that comes into your organization should be considered either a present or future opportunity and it begins with Record Matching. **Votacall Touch for Salesforce** streamlines the Record Matching Process right in the app. *When a call comes into a Salesforce user:*

- Votacall Touch scans your Salesforce accounts, opportunities, leads, contacts, cases and users for matches based on the inbound Caller ID and presents the match to your employee
- If there are multiple matches, your employee will be presented all options from which they can select the most appropriate all while still handling the prospect or client call
- The app will automatically associate all call details to the matched record within Salesforce and with minimal manual intervention (the click of a button), your employees will be able to associate all call notes to the record as well
- If Votacall Touch for Salesforce does not return a match, the call will be categorized as such and will appear on the Unassociated Calls Report which is accessible with a single click of an icon right in the app.

In addition to appropriately categorizing information and effort, Votacall Touch allows the employee to focus on delivering excellent service and support rather than cumbersome tasks. Your employees will have simple access to the pertinent information that will empower your employees to deliver a personalized customer experience to your clients and prospects. drives a personalized experience.

Employees will Instantly have access to the important customer specific information right in their Salesforce CRM based on caller ID, client record or custom landing page created by your company, thus arming them with valuable information to handle any and all incoming calls. Therefore, when an employee answers a call, he or she can immediately deliver a truly consultative and customized engagement, whether the goal is to sell a solution or solve a problem. Indeed, according to Customer Experience Insight, the number one customer expectation that businesses must deliver is a more personalized experience. A **Salesforce + Phone System** integration will make this happen and be a major differentiator with every customer and every call.



## **ADVANTAGE 2** Analytics & Visibility

While Salesforce does have a robust and customizable analytics package, the missing piece is the relationship between the phone system and Salesforce itself. We have taken a difficult, time consuming and cumbersome relationship and have simplified it with an app that looks and feels like Salesforce and lives and breathes right in the CRM. There are no clunky plug-in or computer installations. Once you access the app from the Salesforce AppExchange, it will start improving your Salesforce experience immediately. One of the major advantages to our native Salesforce app is the efficient, always on data collection capabilities that will transform streams of information into valuable visibility for your employees, managers and stakeholders. With a **Salesforce + Phone System** integration, you will have the ability to capture all data without the cumbersome added steps that slow employee productivity to a crawl while heightening their frustrations. Native **Salesforce + phone system** integration will do the heavy lifting for your employees through Record Matching. All inbound calls employees and agents will be empowered to capture real-time calling data, such as whether a call originated from a smartphone or office phone, when a customer called, and so on. Importantly, all of this data and activity is recorded in Salesforce, even if agents are not logged into Salesforce at the time.

All of this valuable data can be used to support individual customers, as well as identify big picture trends. For example, if you identify that relative to other times/days that agents receive a significant number of sales-related calls between the hours of 1:00pm and 4:00pm on Thursdays, you can increase staff coverage during that period. Or if you identify that many technical-support related calls are originating from smartphones, you can direct your team to tell customers about your support app, web-based chat, or other self-service tools that may help them get the answers they need simpler and faster.

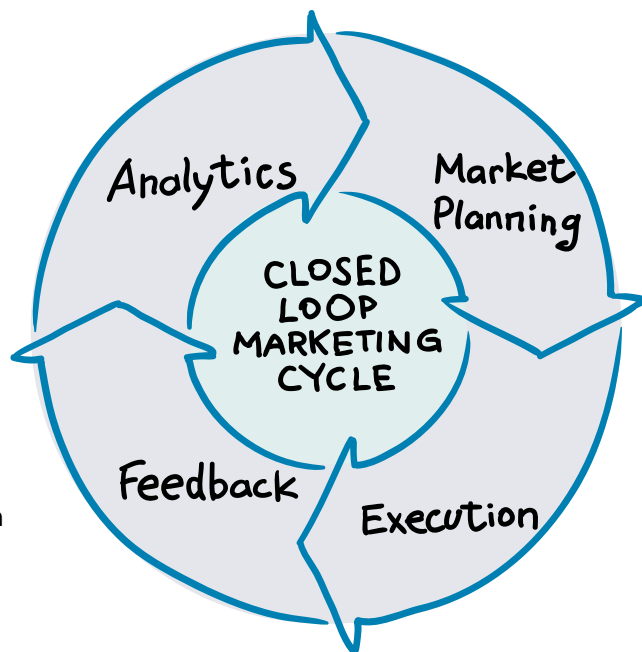
Having this data also allows you to run custom reports based on phone calls, such as a popular Unreturned Missed Call Report. In this particular report, you can see all the missed calls that have yet to be returned. Since it can be run at anytime, it can provide insights into staff practices and provide guidance into daily activities.

In the end, the real-time and historical reporting capabilities that a **Salesforce + Phone System** integration app offers, protects the overall investment in Salesforce due to the additional analytics it provides to customer communications.

### **ADVANTAGE 3** Exploit Closed Loop Analytics for Marketing

In the past, marketing teams had to rely largely on anecdotal evidence, extremely small sample sizes, or sometimes just “best guesstimates” to evaluate the effectiveness and ROI of various marketing campaigns, strategies and tactics.

However, a **Salesforce + Phone System** integration supports closed loop analytics, which reveals unprecedented data-driven insights of marketing performance and impact. For example, if your marketing team launches a series of blog posts based on common support problems, you will be able to track whether this initiative is reducing the number of customer calls about these issues.





## **ADVANTAGE 4** Improve Performance Management

With **Salesforce + Phone System** integration, your leadership team can monitor a variety of call tracking KPIs and metrics while accessing reports that highlight received calls, placed and missed calls, unreturned missed calls, and more.

Based on this business intelligence, your supervisors and managers can improve your team's performance in several ways:

- By using call tracking KPIs and metrics, supervisors and managers can develop and enforce best practices for current employees and future hires.
- These same call tracking metrics can also be used to proactively identify coaching and training opportunities. By being able to see how individual agents or teams are performing compared to their peers, you can easily identify underperforming employees and help get them back on track. It also gives you insight into top-performing employees as well so that you can identify what makes an individual a better salesperson or a better support technician.
- Through seeing reports on overall call trends, supervisors and managers can provide executives with strategic recommendations on staffing rosters. For example, if you recognize that your call center volume increased from 11am until 3pm, you can increase the amount of staff present. Conversely when you see a slump in call volume, you can reduce coverage during those specific days and times.

## **ADVANTAGE 5** Drive Versatility and Agent Ease-of-Use

Frankly, it does not matter how useful, helpful or beneficial technology-led solutions promise to be. As countless failed implementations have demonstrated -- everything from project management software to customer billing solutions to HRIS systems -- if the user experience is not intuitive and simple, then end users simply will not adopt and use it to its full potential.


**Indeed, as observed by Entrepreneur.com :**

*Technology is intended to make things easier -- especially in the workplace...*

*However, technology can inadvertently contribute to a negative employee experience, if you're not careful. When tech suffers from clunky integration, non-intuitive interfaces and weaknesses in the configuration department, employees get frustrated by the complexity and poor design of the very thing they rely on every day to succeed at their jobs.*







Notably, a **Salesforce + Phone System** integration does not trigger “clunky integration, non-intuitive interfaces and weaknesses in the configuration department.” This is because the integration is not based on a connector, but rather a powerful, lightweight browser-based app that sets up easily and quickly via an Install Wizard, and resides fully in Salesforce. In addition, your agents will appreciate that the app supports:

- Access via Deskphone and Desktop Softphone.
- Automatic SSO when Salesforce is launched.
- Full call control in Salesforce (e.g. make/receive calls, call dashboards, dial pad).
- Conference calling and control with visibility within the Salesforce call record.
- On-the-fly status updating (available, logged out, logged in, on the phone, wrap up, DND, etc.).
- Dynamic call control buttons to avoid screen clutter and crowding.
- Voicemail indicator and one-touch (“click to dial”) functionality.
- Automatic task creation when calls are missed (agents can access a list of offline calls to review).

At the same time, your leadership team will appreciate that the app supports both Salesforce Service and Salesforce Sales Cloud, and that all upgrades, maintenance and innovations are included and automatic.

## **ADVANTAGE 6** Available in the Salesforce App Store

Because **Salesforce + Phone System** integration resides in Salesforce, there is no stylistic difference between using the phone system integration and using Salesforce. Therefore, the user experience is in line with the language and functionalities of Salesforce. This makes it easy to implement and ensures that your staff, who are familiar with Salesforce, will also be familiar with how to use the phone system integration.

Having the phone system integration available in the Salesforce App Store also ensures that the mobility of Salesforce that your employees love is also present in the phone system integration.

We’ll discuss the power of true mobility in the next section!





## **ADVANTAGE 7** True Mobility

While many Salesforce competitors use connectors or plug-ins that are installed on a single device, this can be a problem when the user travels or works remotely. It can also become a big problem when a company implements a business continuity or disaster recovery plan due to inclement weather, onsite environmental issues, infrastructure problems, etc. All of this ties workers to their desk and limits their access to critical Salesforce insights when they're not in that one place.

Wherever your Salesforce users go, the Salesforce app goes with them because it isn't installed on a particular PC or on one specific device. It can be installed on each user's computer or personal mobile device to be used at the office, at home and on the go. This means your employees will have the full power of the **Salesforce + Phone System** integration wherever they are working.





## **ADVANTAGE 8** Directory Search

Integration is a powerful business term that will translate into an enhanced employee experience. Votacall has created a true relationship and synergy between the communications platform (your phone system) and the Salesforce CRM which opens up communication tools that can have an impact on how your employees collaborate. One such feature is Directory Search. With Votacall Touch employees will have access right in Salesforce to a company directory thus allowing users to enter the name of a colleague in the search bar, find the match, click and go. For organizations both large and small, the simple access to the company directory will encourage greater employee collaboration efforts and save time doing it.



## ADVANTAGE 9 Picklist Access

We have seen that many Salesforce users have Pick Lists created by their administrators to categorize calls based on campaigns, products suite, geography etc. Picklists are a great tools for analyzing performance, resources and success and Votacall Touch has made the gathering of this valuable information simple. Votacall Touch users will have access to Picklist dropdown menus specifically associated with them, accessible right in the app. With a single click, employees can associate a call to a Picklist and never skip a beat.



**Votacall Touch - Data capturing, speed and simplicity at your employees' fingertips!**



# Why Votacall Touch for Salesforce Is The Perfect Salesforce Partner

When looking for a **Salesforce + Phone System** integration, it's important to choose the right phone system and the right partner. By joining forces with the Votacall Touch for Salesforce, your company will enjoy these key benefits:



**Minimal Capital Expense (CapEX) Costs:** Unlike on-premise PBX landlines, with Votacall Touch for Salesforce there is no costly hardware to purchase, install, configure and maintain. The only up-front costs for a typical implementation are certified VoIP phones for end users, and if necessary, low-cost managed routers so the system can be monitored and managed remotely.



**Substantial Ongoing Cost Savings:** Since there are no costly trunk lines to rent, maintenance packages to buy, or long distance costs to cover, Votacall Touch for Salesforce delivers substantial ongoing cost savings. What's more, these substantial savings are not limited to the first year or first few years. They continue accruing. It is not uncommon for savings to reach or surpass 50 percent each year vs. a conventional landline system.



**Rapid Implementation:** Unlike traditional landline phone systems, Votacall Touch for Salesforce implements quickly. It can easily be taken care of after-hours or on weekends to eliminate disruption to staff and customers.



**Multiple Cost Models & Options:** With Votacall Touch for Salesforce, you can customize the installment plan based on your specific needs and budget framework. Instead of accepting a one-size-fits-all package or being subjected to numerous additional costs for everything from installation to vague "professional services," you can choose from multiple cost options and models -- starting from as few as five end users, to well over 1000.



**Total Mobility:** Votacall Touch for Salesforce supports total mobility by enabling end users to install a free app on their smartphone, and make or receive calls from anywhere. They can also have calls forwarded to their home phone/another smartphone if desired so they are always within reach and ready to be productive, as well as make and receive calls through their desktop (i.e. "softphone").



**Outstanding Audio & Video Quality:** Votacall Touch for Salesforce uses managed routers and blazingly fast broadband to deliver high-definition audio and video. This level of quality is on par or superior to traditional landlines systems that still essentially use copper wire “technology” from the 19th century.



**Built-In Disaster Recovery:** During a power outage, traditional landline phone systems can go down for minutes, hours or even days. However, Votacall Touch for Salesforce uses multiple levels of redundancy -- including geographically dispersed cloud infrastructure and automatic failover response -- so that even during a local power outage caused by natural disaster, downed power lines, or any other issue, the system remains functional.



**Seamless Scalability:** The only constant in business is change, and that means next year’s staff roster could be substantially bigger – or smaller – than today’s. With Votacall Touch for Salesforce, you simply purchase as few or as many licenses as you need. As noted above, other than certified VoIP phones and (if necessary) a managed router, there is no costly hardware to purchase, and no on-site equipment to manage or maintain.



**No On-Site IT Burden:** Like most IT teams, yours is likely overwhelmed with tasks and priorities -- and the last thing they want is to deal with phone system-related support tickets and installation issues. Thankfully they won’t have to with Votacall Touch for Salesforce. There is no on-site IT burden, since everything – including troubleshooting, installations, staff training, upgrades and so on – is handled by our experts. What’s more, 95 percent of issues can be addressed remotely.



**Ongoing Innovation:** Landline phone companies reserve their latest innovations for new customers, because they are offered as incentives. Existing customers are on the outside looking in. However, this is not the case at all with Votacall Touch for Salesforce. You will always benefit from ongoing innovation and the latest upgrades.



**Advanced Unified Calling Features:** Votacall Touch for Salesforce offers a set of advanced unified calling (UC) features that are either very costly with a traditional landline system, or in some cases aren’t available at all. These include (but are not limited to) voicemail to text, video conferencing, direct-in-dial, one-number service, instant messaging, 3-way calling, extensions, desktop sharing, calendaring, customized auto-attendant, music on hold, hunt groups, ring groups, and more.



## Next Steps

- *If you want to learn more about upgrading from a limited and costly landline system to Votacall's award winning, state-of-the-art Office Access Cloud Phone System, then [contact us today for your free consultation and expert-led demo.](#)*



## About Votacall

Votacall is a leading provider of cloud-based voice solutions and business communication systems with an expertise in VoIP, Unified Communications (UC) and Call Center design and deployment.

The Votacall value proposition is simple: we conduct ongoing R&D to deliver our customers and channel partners with the latest best-in-class Hosted VoIP and Unified Communications solutions, so they can stay ahead of the technological curve while enjoying the industry's lowest Total Cost of Ownership (TCO). Our relationships, expertise, and relentless focus on unleashing game-changing solutions are the core reasons for our ongoing success.

The Votacall Touch for Salesforce is our flagship solution. Built on the BroadSoft Class 5 Service Provider switch located in geographically diverse data centers, this platform enables our customers to take advantage of enterprise communication applications, reliability, scalability, ultimate redundancy, and true investment protection – and all without the corresponding budget or capital expense required of legacy platforms.

*Learn more about Votacall today by visiting [votacall.com](http://votacall.com)*



185 Devonshire Street, Suite 700 | Boston, MA 02110



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