Telephony and CRM Integration Software

SYNETY

SMARTER COMMUNICATIONS

Foreword

As you search for a telephony integration for your CRM platform, it is important to make sure you choose the solution that meets your business needs while fitting comfortably within your budget. Here at SYNETY, we want to help make your search for the right solution easier, so we've prepared this buyers guide to cover the features and options that are most important in a telephony integration.

Be sure to utilize the free feature checklist at the end of the guide as you evaluate solutions such as CloudCall. Make sure the integration will work for you and that you'll receive the level of support your business deserves.

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What you need to know when integrating your phone and CRM systems

The gap between your phone and CRM system is slowing down your sales productivity. You know that connecting them will allow you to increase call volume, gain better visibility into call activities and improve training. But what are the key features and technical requirements you should look for when choosing the right integration solution?

Our buyer's guide explains all of the essential features you'll want to look for in a solution, as well as important questions you need to ask when considering potential vendors.

We've broken down the evaluation into a few parts, covering software features, dialer options and support requirements. You'll want to ensure these key features are included in your solution to get the biggest ROI and productivity gains.

Software Features

Click-to-call

Ability to click on a contact's phone number and dial directly within the CRM. This prevents wasted time and misdialed numbers.

Inbound screen popping

For inbound calls, receiving pop-up alerts with a link to the contact's record in your CRM puts the information you need at your fingertips. Especially useful for organizations focused on customer service and support so that you can provide a personalized experience for the person calling.

Call notes and categorization

A CRM-telephony integration should make it easy to complete wrap-up activities without navigating to different screens. When you make calls within your CRM, you should be able to categorize calls and take call notes from the same screen.

Call analytics

Call activity reporting with real-time performance analytics and dashboards are essential to monitor productivity. You should be able to sort call data by category as well as easily access the results of outbound call campaigns made from the dialer. You will also want to make sure that it is easy to include call activity data inside of your CRM reporting capabilities.

Telephony Features

Call recording

Record all inbound and outbound calls made from any device associated with the system (desk phone, softphone and even mobile phones). These recordings should be easily accessible directly in the contact record and easy to forward outside of the CRM. You should also be able to set playback and accessibility permissions for recordings, as well as pause recordings during a call for privacy and compliance purposes.

Inbound automatic call distribution

If you have multiple products or services that receive different types of calls, you want to make sure you can create multiple campaigns and have calls directed to the appropriate people. This feature will also allow you to queue and distribute inbound calls to available representatives. Also look for agent prioritization, which allows you to ensure users answer higher priority calls, based on pre-configured settings.

Call monitoring

Allows authorized supervisors to listen in to users calls and whisper to them if they need help. Great for training, this feature allows managers to coach new employees. Additional services in this feature includes a barge function that allows the supervisor to intervene in the call and be heard by both participants.

Dialer Options

Choosing the right dialer is vitally important. The right choice can help your business increase and improve customer engagement and their interest in your products and services. There are three main types of dialers available today.

Preview Dialer

Allows callers to view information about the contact and decide when to place the call - no calls are automatically placed. When the call is finished, they will see information about the next person in the queue which gives the caller time to plan the strategy for their next call.

Power dialer

A power dialer automatically dials contacts in an outbound call campaign from a prepared list and allows users to increase call volume and productivity. This dialer only places calls from available agents, so there is no danger of customers being called without anyone prepared to speak to them. It also allows you to set a pre-determined wrap up time to complete call notes and create follow-up tasks.

Predictive dialer

A predictive dialer produces high call volume by using statistical algorithms to minimize idle times between calls. The dialer assumes the length of each call a sales rep makes and starts dialing the next contact in the list as that time on the call nears. The risk being that the dialer will place the next call and the sales rep will go over their average call time - leaving the contact with dead air upon answering the call.

For example, if a typical telemarketing call lasts 1 minute, the dialer will start placing the next call at 50 seconds. However, if the agent spends 1 minute 30 seconds on a call, and no other agents are available, the call will drop and the contact will hear a dial tone when they pick up the phone.

Support Requirements

System Flexibility

It's important to look for a vendor that offers the flexibility to work with the systems you have in place. You should have the option to use your current phone system or have the vendor provide a phone system if you need it. If the solution is used as an overlay to your existing phone system, you can avoid additional infrastructure costs. This will also give you the freedom to manage and choose the vendors that you want to work with, whether for your phone system or your CRM software.

Extended Support

Look for a vendor with a well-reviewed, knowledgeable and helpful support team. You want them to work with you through the implementation process and beyond. Be sure to speak with a member of the support team before you decide to purchase a solution and ask questions about the implementation process and schedule. They should set realistic schedules for getting you up and running - not promising next day or pushing you out for a month - and they should work with you on the best time to initiate the project. Also look for a vendor that gives the option of additional and customizable support so that your needs are met.

Training

Phone systems are complicated to use and install, so make sure you're provided the knowledge and training you need to run your own system. Ask about training time for users and if they have clear reference materials like guides and videos.

Use our Feature Checklist to determine which solution is right for you

When evaluating vendors for your telephony integration, make sure you ask the right questions. We've provided an easy-to-use feature checklist to use while reviewing solutions.

Only you know what your business needs, so the template is designed to help ensure you get the right features for you. Create your own evaluation criteria and use the checklist when researching vendors to review and compare the services they offer.

Feature Checklist

VENDOR NAME: _____

☐ **Click-to-Call Direct from CRM**

☐ **Inbound Screen Pop alert with link to contact record**

Call Recording Features

☐ Set playback permissions at user level

☐ Access recording from inside CRM

☐ Forward outside of the CRM system

☐ Pause recording (important for businesses with compliance or privacy requirements)

Add Details to Call Records

☐ Notes

☐ Categories

☐ Create future follow-up task or event

☐ Set call record field requirements

Inbound Automatic Call Distribution

☐ Create multiple campaigns for inbound calls

☐ Agent prioritization

Dialer Type

☐ Preview

☐ Power

☐ Predictive

Call Analytics

☐ Real-time dashboards

☐ Ability to report on call activity from CRM

☐ Schedule automated reports

☐ Granular data reporting, i.e., call duration, call type

Flexibility

☐ Can I use my existing phone system?

☐ Can you provide a phone system if I need it?

☐ Can I keep my existing number?

Support

☐ 24/7 help availability

☐ Support in my working hours and time zone

Training

☐ Training materials, i.e. quick start guides, videos, etc.

☐ On-site training available

How Long to Install/Provision? _____

Solution Cost? _____

CloudCall

CloudCall by SYNETY integrates your phone and CRM system to help you make more calls and close more deals with features like click-to-dial, call recording and real-time performance analytics.

- Make calls directly from your CRM with click-to-dial

- Record calls for training and compliance

- Prioritize your important inbound calls

- Personalize conversations with screen popping

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