

The background of the entire page is an aerial view of the New York City skyline, featuring the Empire State Building and other skyscrapers. The image is overlaid with a semi-transparent purple filter.

Contact Center and CRM to the Cloud: The Migration Imperative

Contents

CRM Has Flourished in the Cloud... 3

...But Contact Center Has Been Slower to Transition 3

Bringing it All Together 3

National Office Furniture 4

New Channel Leads to Re-Design 4

Upgrade CPE? 4

Go Cloud! 4

Before and After 5

FCR Media 5

A Cloud-First, Digital Transformation 5

Existing Vendor for Transition from Premises to Cloud? 5

The Difference that Cloud Has Made 6

MTD Products 6

A Seven-Year Salesforce Roadmap 6

There's Integration and Then There's INTEGRATION 7

First the US, Next the World 7

Elevating the Agent Experience 7

About NewVoiceMedia 8

About McGee-Smith Analytics 8

CRM Has Flourished in the Cloud...

While today the use of customer relationship management software (CRM) has become almost a de facto standard, its rise to this elevated position has not happened overnight. Paralleling the rise of computing, it started with digitizing the Rolodexes of an earlier time, first in mainframe computers using custom relational databases. The next move was to personal computers and the era of database marketing. This was followed by salesforce automation and then, in 1995, the first software using the name "CRM."

1. But it was a bold move by Marc Benioff and his co-founder Parker Harris in 1999, to create Salesforce.com and the first software-as-a-service CRM, that heralded the current generation. As we head into 2019, cloud customer relationship management software rules the day, with a reported 80 percent of all CRM deployments. And 20 years after its founding, Salesforce is the undisputed market leader, ranked number one in market share revenue

...But Contact Center Has Been Slower to Transition

Twenty years ago, contact center and CRM software were on a converging path. In 1998, then-CRM market leader Siebel acquired Scopus for \$460 million to add cutting-edge call center technologies to its application. In 1999, Nortel (then holder of the number-two spot in call center market share) purchased Clarify (with a 21 percent share of the CRM market) for \$2.1 billion.

Changes were happening in the PBX and ACD markets as well. Switch vendors began reinventing their PBXs as application servers. Perhaps the strongest statement from a vendor attempting to make this hardware-to-software transition came from Aspect Communications. The company's president at the time said, "I am pleased with the progress we have made during 1999 in the company's transformation from a telecommunications equipment supplier to a provider of CRM solutions."

"The call center market is broadening to address customer relationship management as opposed to mere transaction management." These words were written by me in a report, A New Call Center Paradigm: CRM, published in 1999. The report went on to say, "New partnerships between solution providers and systems integrators will drive how quickly CRM solutions become part of the call center landscape."

Bringing it All Together

The bad news is that a large percentage of companies continue to operate with suboptimal agent and customer solutions. The good news is that in the past few years, the benefits of bringing cloud CRM and contact center together have become a reality for a growing number of firms.

In the sections that follow, we will highlight three such companies. We will detail the situations that drove the change to integrate CRM and contact center in the cloud as well as the benefits they have derived since implementation.



National Office Furniture

In 1980, National Office Furniture joined the contract office furniture market with a goal to be a standout. By offering quality furniture at a better value and with shorter lead times, National jumped onto the scene and customers jumped at the opportunity to get the furniture they wanted in the budget and timeframe they needed.

National understands that furniture is about a personal experience. In an industry where there are literally thousands of choices, one of National's key goal is for experience is the differentiator. That emphasis on experience extends to their customer care operation.

New Channel Leads to Re-Design

Since 2008, providing an excellent customer experience at National involved using Salesforce Service Cloud, together with Sales Cloud for the past five years. Until 2017, with no integration to its contact center solution, agents would create cases in Salesforce for every phone call, email or web chat interaction that took place with a customer.

In the fall of 2017, National embarked on a project to add SMS texting as a new channel. The company also wanted to make screen pops available to agents from within Salesforce, to streamline the existing process. A project team with representation from information technology, customer care operations and unified communications (UC) engineering was formed. UC engineering was relevant as the current contact center solution was a component of the existing PBX system.

A No-Brainer

“When we looked at the capabilities and what we were going to spend on NewVoiceMedia versus what we were going to spend just to put in place a connect to enable a basic screen pop to upgrade the premises solution, it becomes a no-brainer that we should move forward with a cloud-based solution.”

Upgrade CPE?

After implementing email-to-case and SMS-to-case in Salesforce, National also decided to investigate upgrading the 10+-year-old, premises-based contact center. Early on, it became clear that upgrading the existing solution was not the best option. “We would be spending money to add connectors on top of a rather old solution,” said National's director of information technology.

In addition to making it easier for agents to create and handle cases in Salesforce, National had another goal: as they grew, they were increasingly aware of the need for a disaster recovery plan. With a premises-based system, they knew they were vulnerable to fire or some other calamity that would shut down the contact center.

Go Cloud!

The combination of National requirements led to an investigation of a cloud PBX solution. After a few meetings and demos, they “just did not feel real comfortable” with what they had seen so far. National decided to reach out to the consulting firm, GearsCRM, that they were working with on a Salesforce Service Cloud upgrade. GearsCRM recommended they take a look at NewVoiceMedia.

National liked what they saw. “We were going to get more capabilities, things like call recording (which is huge), ease of use, ease of integration, it would be easy and quick to implement, which were all significant factors.” From a disaster recovery perspective, NewVoiceMedia would provide more options. National would have the ability to adopt more of a work-from-home strategy.

Happy with the interactions they had with the NewVoiceMedia team, what they saw in the demo and the solution's capabilities, National signed in January 2018. The solution went live just eight weeks later, in mid-March.

Before and After

Looking back several months after the move to NewVoiceMedia, it was easy for National to articulate how different the day-to-day experience for agents and supervisors has become. Some of the specific improvements mentioned included

1. From a call transfer process, National has shortcodes programmed into the contact pad, so team members do not need to go to multiple sites to find information to transfer a call.
2. The robust reporting and the auto call recording are “huge” because it enables National to truly determine the quality of the service they are providing. Team members are even rating their own calls and then reviewing with supervisors, a great agent empowerment improvement.

Having had a positive implementation and roll-out experience, National is already looking at ways to expand the functionality of their NewVoiceMedia deployment, continuing to build on its Salesforce foundation.

FCR Media

FCR Media is a group of digital media companies facilitating commerce and relationships for businesses in Baltic States, Ireland, Czech Republic, Slovakia, Romania, Croatia, Hungary, and Belgium. With a highly trained workforce of 1,200 employees, a comprehensive database and relationships with well-established media brands, it seeks to be the best provider of leads for small and medium-sized businesses in its markets.

A Cloud-First, Digital Transformation

The impetus to update the contact center was part of a broader digital transformation at FCR. The strategic principles being driven by IT as it chose applications to run the business were: cloud-first; buy, don't build; and configure, don't customize.

Those three principles meant that everything would be in the cloud - FCR didn't want to have anything on the premises. The company didn't want to have to invest resources in operations and support; they wanted to have that handled by the vendor, in the cloud.

Existing Vendor for Transition from Premises to Cloud?

The first step in customer service transformation was the implementation of Salesforce, replacing a premises-based Amdocs solution. Next would be an upgrade to the contact center system. FCR's initial internal assumption was that they would stay with the same vendor that delivered the existing premises-based system but move to that company's cloud version. However, FCR had not been completely satisfied with the current vendor on several dimensions and decided to also look at additional cloud contact center solutions.

There were four criteria for choosing new solutions: business, functional and technical fit, and cost. Contact center management made the final recommendation on business and functional fit from among the solutions considered. From the first demo from NewVoiceMedia, the contact center team was impressed. “They just weren't used to everything being so simple and easy. When it's a unified experience for the user, and the agent is not going from one application to another and through 15 different screens, it was so empowering.” A deciding factor in the decision to choose NewVoiceMedia over the incumbent's cloud solution was that “their integration with Salesforce wasn't as seamless.”

Salesforce Relationship: Definitely a Plus

“It was definitely a plus that NewVoiceMedia does many Salesforce implementations and they knew Salesforce through and through. They can really speak to the use case of how we wanted to use Salesforce.”

The other cloud UC/contact center company we talked to had some integration with Salesforce but they certainly did not align just to Salesforce, they did many other systems. I think in our case, it was a definite benefit that NewVoiceMedia knew so much about Salesforce”



Salesforce Integration “Hugely Important”

“The user experience with NewVoiceMedia and Salesforce is very seamless. It feels from a user experience perspective that you're in the same system, always.”

It is worthy of note that another important factor in FCR's decision to choose NewVoiceMedia over the existing vendor was the product roadmap for each solution. It was FCR's opinion that the existing vendor would be spending the immediate future "plugging gaps and features" that NewVoiceMedia already had. "The evolution in the product roadmap was not very strategic, it wasn't forward-looking," was FCR's reaction.

The Difference that Cloud Has Made

It is often the simple things that make life better, and that can extend to one's business life. Asked how he would characterize the difference between FCR's operation before and after the replacement of premises-based CRM and contact center solutions with cloud, the simple answer was that it works. "There's a high degree of confidence, if you are a user, that when you walk in in the morning, and you switch on the system, it's always going to work."

For contact center supervisors, the ability to make changes to call plans themselves, without having to involve the IT department, has been the most significant change. In addition, supervisors are embracing the numerous coaching capabilities available on NewVoiceMedia and looking forward to the future implementation of speech analytics capabilities as well.

For the IT department, the change has been – in the first few months of operation – literally no need to be involved with the contact center system.



MTD Products

Founded in 1932, MTD Products Inc is a worldwide leader of outdoor power equipment headquartered in Valley City, Ohio. Through facilities in North America, Europe, Asia, and Australia, it produces mowers, snow throwers, utility vehicles, trimmers, tillers, and more for both residential and commercial markets. The company's products are sold both online and across the globe in all channels of distribution including home improvement stores, hardware stores, mass retailers, independent dealers, and farm supply stores.

MTD products include a variety of brands, including Cub Cadet, Troy-Bilt, and Remington, as well as Robomow, Yard Machines, Rover, WOLF-Garten, and Bolens. While diverse in nature, the company says its brands share one thing in common. They are all backed by a strong network of MTD support focused on uncompromising quality, service, and value.

A Seven-Year Salesforce Roadmap

As a key part of its commitment to exceptional quality and service, in 2013 MTD laid out a seven-year Salesforce roadmap – one could almost call it their digital transformation blueprint. With a long-term goal of doing dealer fulfillment through eCommerce, they realized they had to get all of the building blocks in place to meet that goal. Sales Cloud was the first application implemented and Service Cloud followed a few years later.

MTD understood that moving to Service Cloud would also mean replacing the existing "phone system," a premises-based system that was at end-of-life. MTD did a request for proposal and five companies submitted proposals.

There's Integration and Then There's INTEGRATION

As they evaluated the proposals that had been submitted, MTD quickly realized that the contact center vendors had widely different views on what constituted "integration" with Salesforce Service Cloud. The most obvious difference was that several of the solutions that

"integrated" required MTD's IT team to create custom integrations to help them integrate. According to MTD's manager of IT, "That was a big NO. I did not want to build integrations between things."

MTD went on to explain that, "NewVoiceMedia did not require us to customize anything on our side." In addition, NewVoiceMedia gave MTD the ability to leverage existing systems that they had, not just Salesforce. MTD had implemented a feature that allowed an external IVR respond to dealer locator questions and order or warranty claim status. They were able to make that work within the new NewVoiceMedia framework quickly.

First the US, Next the World

As was true at National Office Furniture, one of the most significant changes MTD realized after moving from premises-based contact center was, "the business was taking a lot of the heavy lifting." IT is not involved on a day-to-day basis, the way it was in the past.

For the contact center supervisors, NewVoiceMedia offers a robust set of reports and access to all call recordings, something that was not true in the past. The real-time dashboard has given agents, supervisors and the business insight into the number of calls that are being abandoned – something MTD had no visibility to in the past.

MTD rolled out NewVoiceMedia first in its United States contact center but has plans to implement the solution in its Canadian and Australian centers in the next few months. Just as they left a premises IVR system in place that was providing useful applications, MTD says it will continue to use the in-place premises PBXs as media servers to provision voice services as it rolls out NewVoiceMedia globally using WebRTC technology.

Elevating the Agent Experience

A consistent theme in the discussions held with these companies about their decision to choose NewVoiceMedia as their cloud contact center vendor over other possibilities was the companies' focus on working with Salesforce Service and Sales Clouds. Whether these companies had existing Salesforce deployments or were simultaneously replacing legacy contact center and CRM solutions, NewVoiceMedia's integration to Salesforce stood out as more seamless than the one, three or five alternatives investigated.

The experiences of contact center supervisors, managers, and company executives inevitably improved with the updated, integrated cloud CRM and contact center solutions. Often this can be attributed to the ability to deploy advanced features, such as 100 percent call recording and post-call surveys, that can be prohibitively expensive for mid-sized contact centers with a hardware-based system. MTD highlighted their ability to train and equip seasonal staff quickly – so little training is required as the modern interface mimics the smartphone applications people use every day.

It is the improvement in agent experience, however, that each of these companies emphasizes as they recount their migration experiences. The reduction in the number of applications and screens that they need to access to handle a single interaction is a valued benefit. The new, richer integration with Salesforce allows the agents to know more about their caller and provide more personalized service – the ultimate goal of all service professionals.

A Different Kind of Partnership

"With the other companies, getting answers back on RFP questions was very slow. NewVoiceMedia was very quick. They also asked us questions, which none of the other ones did.

They sought to understand what MTD was trying to do in our business and were curious about our roadmap. Nobody else asked about that. It was a different kind of partnership."

About NewVoiceMedia

NewVoiceMedia is a leading global provider of cloud contact center technology that enables businesses to create exceptional, emotive customer experiences to serve better and sell more.

Its award-winning platform joins up all communications channels without expensive, disruptive hardware changes and plugs straight into your CRM for full access to hard-won data. With a true cloud environment, NewVoiceMedia ensures complete flexibility, scalability and reliability.

About McGee-Smith Analytics

Sheila McGee-Smith, the founder and principal analyst at McGee-Smith Analytics, is a leading customer experience industry analyst and strategic consultant with a proven track record in new product development, competitive assessment, market research, and sales strategies for customer care solutions and services. Her insight helps enterprises and solution providers develop strategies to meet the escalating demands of today's consumer and business customers. She is the contact center track chair for Enterprise Connect, and her views on the market can regularly be found on NoJitter.com and through her Twitter feed @mcgeesmith.