



Increase Your CRM's Value with Cloud Communications

Create a Frictionless Experience for Stronger Customer Relationships



Customer relationship management (CRM) solutions are increasingly powerful and increasingly necessary. CRM is the third most-used technology among sales teams, according to a 2018 survey by Salesforce.¹ The same survey found that 83% of salespeople agree that CRM “makes it easy to find the right information at the right time.”²

Your company may have a CRM system. But is it working in concert with your other business applications or against them? If you're using outdated communications technology, chances are you're missing an opportunity to create a seamless experience that improves customer service and increases team performance.

Cloud communications can optimize your CRM and create a frictionless experience that allows your business to provide faster, more personalized customer care and make your team more efficient.

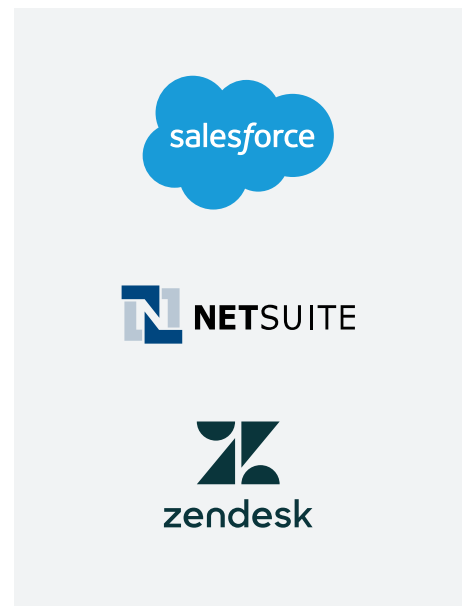
If you're ready to unlock the full power of your CRM, this checklist is for you. Read on to learn five things you should look for in a cloud communications solution to ensure your business is running at its best.



1. Out-of-the-box CRM integrations

It's critical that you look for a cloud communications solution that works out-of-the-box with popular CRM applications, such as NetSuite, Salesforce and Zendesk. If you don't, you could waste precious time and resources connecting your communications to your CRM, decreasing the value of both investments.

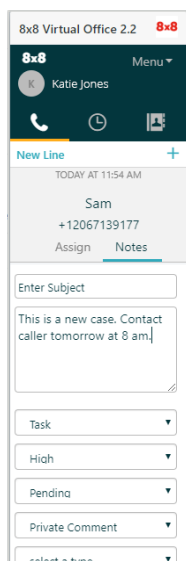
Communications solutions that come ready to work with CRM are easier to deploy and implement. Faster deployment and implementation mean employees can access features like click-to-dial, customer information screen pops and automatic call logging right away. Out-of-the-box integrations make it easy for businesses to experience the benefits of cloud communications and CRM working together as quickly as possible.



2. Works with existing applications

Integration with other business applications, such as productivity and collaboration software, is another capability to look for in a communications solution. A solution that works with applications like G Suite and Skype for Business creates one experience across applications.

These integrations make it easier for employees to pull up contact information, make and receive calls and view customer history within the applications they already use. Employees can access all of the features they need to serve customers quickly and effectively. Managers have greater visibility into the business through shared data and insights. Choose a communications solution that is designed to work with your business applications to increase your team's productivity.



3. Allows for customization

Some communications solutions allow personalization on the user level, letting employees customize what information is displayed and how it is delivered within requirements set by the company. For example, an employee could choose to see a customer's LinkedIn profile while he or she is on the phone with the customer. When employees tailor the system to their preferences, they are more likely to use it effectively.

Another feature businesses should look for in a communications solution is the ability to change settings without experiencing downtime. Some communications and CRM integrations require a business to shut down the applications in order to change settings. The resulting downtime can lead to lost productivity and frustrated employees. Be sure to check whether your communications solution will let you modify settings while maintaining business continuity.

4. Enhances customer service

Tailoring individual customer experiences based on past interactions is critical to business success, according to another Salesforce survey.³ When your communications and CRM work together, employees have access to features such as caller ID, screen pops and call history that provide context to every call. Some systems will even display emails exchanged between an employee and a customer. Each of these features helps to accelerate speed to resolution, build stronger customer relationships and engender loyalty to your business.

But creating superior customer experiences doesn't end with the information an employee sees on the screen. Seek a communications solution that includes presence detection and messaging. If an employee doesn't know the answer to a customer's question, he or she can use these features to contact another employee who can help without placing the customer on hold or blindly transferring them. Customers feel valued in moments like these. Employees feel less frustration and provide better customer service.

5. Streamlines workflows

A cloud communications solution that seamlessly integrates with CRM is anything but burdensome. Team members can access features that make their jobs easier, such as the ability to make, take and transfer calls from within the CRM; automatic call logging, including from mobile devices; and call recording. Integrated search, another feature provided by some cloud communications solutions, lets employees quickly look up contacts across the communications and CRM systems.

When multiple systems act as one, employees spend less time with manual data entry and more time servicing customers. As you search for a communications system, keep employee efficiency in mind. It's important to identify a solution that enhances your team's workflow instead of adding to their workload.



Optimize Your CRM

Are you ready for a communications solution that lets you get more from your CRM? Look no further than 8x8 cloud communications, which delivers each of the features outlined above and helps to ensure a seamless experience that builds stronger customer relationships, improves performance and drives higher sales.

To find out more about how 8x8 works with CRM to enhance customer experience and increase efficiency, call 1.866.879.8647 or visit 8x8.com

FOOTNOTES

1. Salesforce, State of Sales Third Edition, 2018
2. Salesforce, State of Sales Third Edition, 2018
3. Salesforce, State of the Connected Customer Second Edition, 2018