



# Vonage Contact Center for Salesforce

Creating an Effortless Experience for Your Customers and Agents



**PARTNER**  
SINCE 2010

# The Situation

**As focus shifts from exceeding expectations to providing a seamless and effortless experience for customers and agents, technology is playing an ever more pivotal role in customer service. Our customers are now multi-screen, always connected, highly informed individuals and they are changing the shape of modern business, resulting in significant pressure on the contact center.**

Customers expect businesses to know who they are, anticipate their needs, and service them swiftly. When their expectations are not met, they are quick to react and share their poor experiences. Negative reviews and comments can echo on social media for years, which damages your brand and pushes customers toward your competitors.

These shifting expectations are forging new operational objectives and raising the status of the contact center to a strategic level. The measure of success has moved into the effortless experience and further away from elaborate service. The key to delivering the experiences your customers crave lies in technology and data.



# The Technology

## Salesforce® Service Cloud®

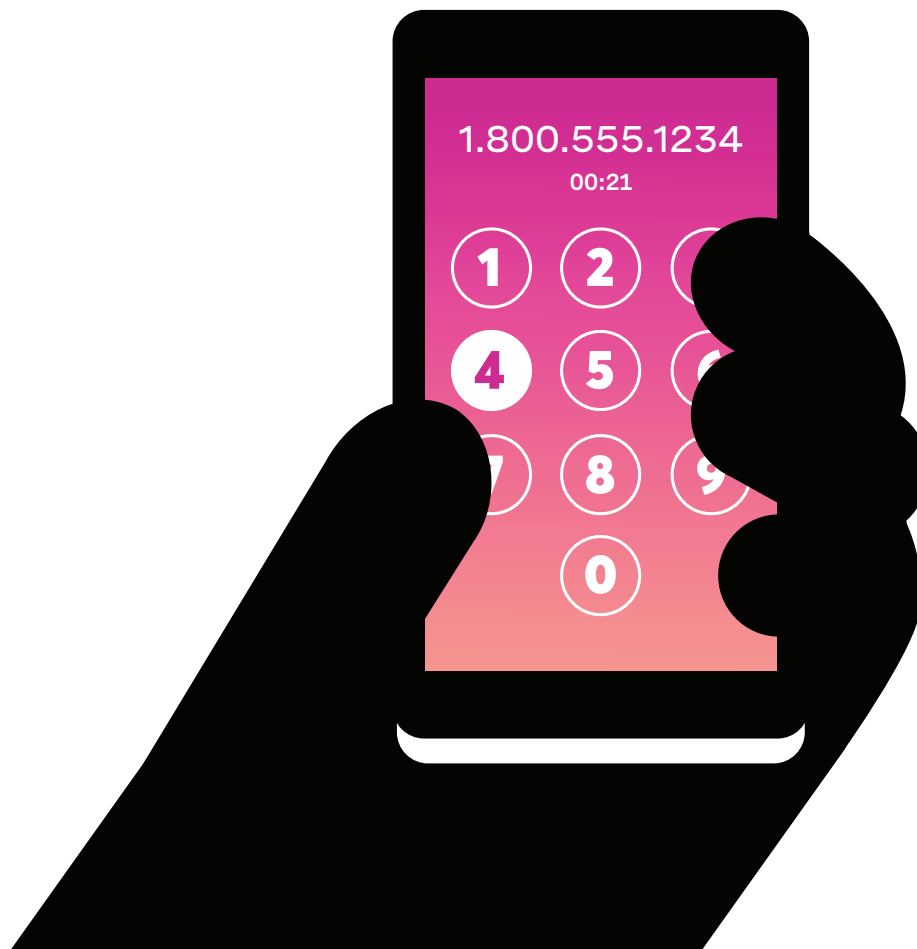
In today's business environment, our customers and prospects are bombarded by choice—so the experiences you deliver and the relationships you build with them are critical to success. Salesforce enables you to keep on top of these important objectives, which allows you to create detailed customer profiles. This valuable data is then critical in helping you foster growth and deliver personal service.

If you aren't already using Salesforce Service Cloud and want to see the full feature set, simply visit the [Salesforce website](#).

## Vonage Contact Center for Salesforce With IVR

Vonage Contact Center has a powerful Salesforce integration that plugs your communications channels into Salesforce to create a complete customer communications platform. The comprehensive feature set provides transformational benefits to the service and support function. For example, a key module is an intelligent IVR that uses your rich customer data to supply personalized options for each customer.

To learn more, [download our IVR datasheet](#)



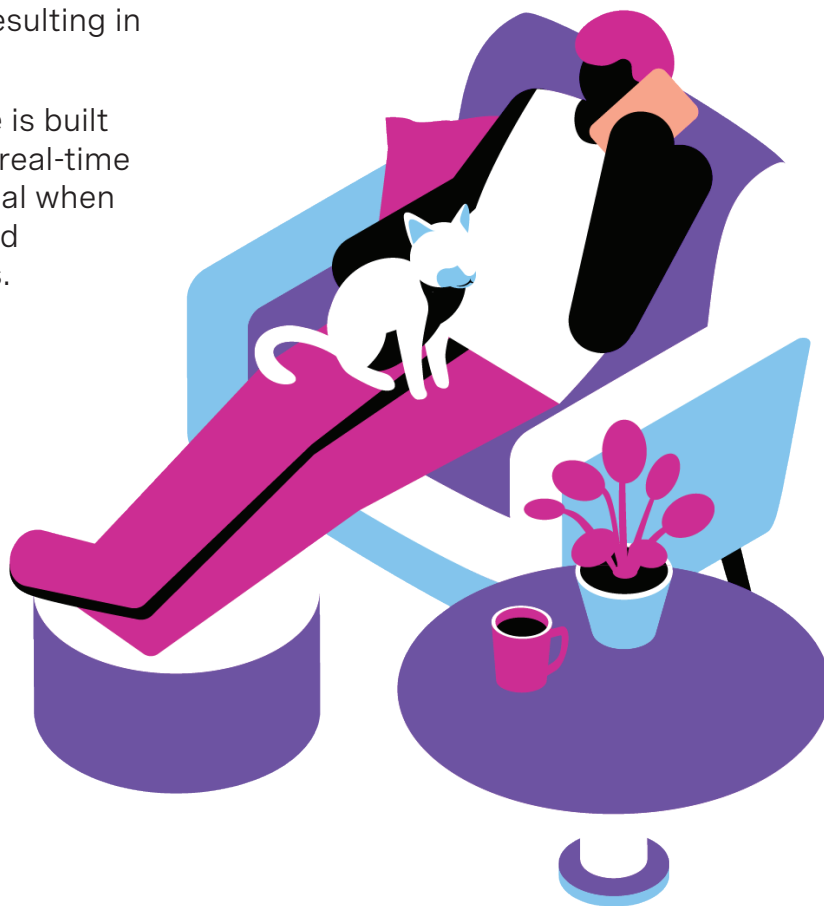
# The Solution

**This guide walks you through Vonage Contact Center for Salesforce and the intelligent IVR capabilities—which help businesses deliver personalized, effortless service and introduce simple and effective self-service. It outlines how you can deliver experiences that both your agents and customers will love. The end goal is simple: To help you improve customer and agent satisfaction.**

Most contact center environments are stuck with a foot in both the old physical infrastructure world and the new digital and cloud world. Connecting these systems can be cumbersome and expensive. The results often leave businesses with multiple pieces of hardware and software from different vendors trying to work together to form a cohesive service experience, resulting in less than adequate performance.

Vonage Contact Center for Salesforce is built for the cloud and boast flexibility and real-time adaptability. This functionality is crucial when it comes to delivering personalized and exceptional service to your customers.

Most calls into your business will hit your IVR and the experience it delivers plays a major role in keeping your customers satisfied. It is time to stop thinking about the IVR from the business perspective and start designing it with the customer in mind.



# Real-Life Scenarios

Outlined here are typical customer use cases. Through each one you will see how Vonage Contact Center and Salesforce work together to deliver exceptional experiences for your customers and agents.

## Personalization

The utopian vision of service depicts every customer receiving personalized service from the beginning to the end of their customer life cycle. With Vonage Contact Center for Salesforce, this vision can become a reality.

### SCENARIO 1

Connecting your contact center with Salesforce data means you have the capacity to present flexible menu options to your inbound callers through your IVR based on any piece of information you have about them in Salesforce.

For example, if you operate a parcel delivery service or a distribution outlet—it's likely that you field customer calls regarding package status. With Vonage Contact Center for Salesforce, you can collect information from the customer when they dial in, review their customer record, and offer them personalized IVR menu options. If the customer has a pending delivery, the system can offer the customer the option for information on their delivery at the top of the list or a completely new selection.

### SCENARIO 2

Personalization extends beyond merely offering your customers what you presume they are calling about. Vonage's IVR technology can also operate in a way to ensure that your customers are never given options that are irrelevant to them.

For example, if an energy company knows that a customer is on a pre-paid meter, they should never be given options to set up direct debit payments. This is not such an exciting part of personalization but one that dramatically reduces the customer effort by reducing unnecessary choice and making it easier for them to get the answers they need.

**Callers should always have the option to speak to an agent, provided that you are open to have agents available. Now with intelligent, personalized, and dynamic menus—you can minimize those that come through to your main contact center number. Reducing agent call volume helps them provide more dedicated care to the calls they do handle.**

## Intelligent Self-Service

Since contact centers incur high call volume for relatively few scenarios, implementing self-service is a simple way to improve the service you deliver. Vonage Contact Center for Salesforce provides an intelligent self-service solution to allow customers to get what they need without ever having to speak to an agent.

### SCENARIO 1

If a customer calls to chase the progress of an open ticket, you can immediately address the request in the IVR. Vonage Contact Center for Salesforce can collect customer information, check their Salesforce record for open tickets, and then offer progress updates or further options—all inside the IVR.

### SCENARIO 2

When a customer wants basic information, such as their credit balance, there's not much an agent can add to the experience. Vonage's intelligent IVR allows customers to quickly and easily find out what they need about their account without having to interact with an agent.

### SCENARIO 3

Sitting in and waiting for a delivery isn't the best experience for customers, particularly if the parcel is late, damaged or never arrives. Vonage's intelligent IVR can help mitigate calls from disgruntled customers in this scenario by integrating with your delivery system to offer information in the IVR about the location of their parcel. If you know your customer was scheduled to receive the package before 10 am, it would be reasonable to assume that a call from them at 10:05 am would be about a late delivery, or maybe a damaged package.

**Presenting the caller with the chance to track their parcel in the IVR prevents agents handling potentially difficult conversations while demonstrating a deeper understanding of your customers.**



## Priority Routing

Providing great service to all customers is essential, but there are always a few where anything less than extraordinary simply won't do. With Vonage Contact Center for Salesforce, you can now apply any number of intelligent routing options based on customer data to help improve the quality of service you deliver.

Identify the key differentiators that apply to specific customers and use this information to deliver priority service. Vonage Contact Center integrates with your custom objects in Salesforce to help you apply virtually any desired use case to your customer segments.

### SCENARIO 1

If you have vulnerable customers that need to be handled with care, Vonage Contact Center can help you identify those callers in the IVR and automatically route them to your specially-trained staff, prepared to handle these specific customers.

### SCENARIO 2

If your key customers are those that spend the most money with you, you can use this value to priority route them to the next available agent or perhaps a particular team dedicated to your priority accounts.

### SCENARIO 3

If you receive calls from many different countries, Vonage Contact Center can identify the nationality of the inbound caller and route them to agents able to speak the correct language.

**Internal routing kills contact centers by wasting the valuable time of both your agents and your customers. Vonage Contact Center integrates with your custom objects in Salesforce to help you route calls through to the right agent. This reduces average handle times, improves first-call resolution, and boosts agent and customer satisfaction scores.**



## Zero Agent Touch

First contact resolution is often a key measure of great service. If your customers only have to speak to you once to get their problem solved, then that is great service. Now with Vonage Contact Center for Salesforce, your customers can find the information they need through self-service. Or you can empower them to provide information without speaking to an agent.

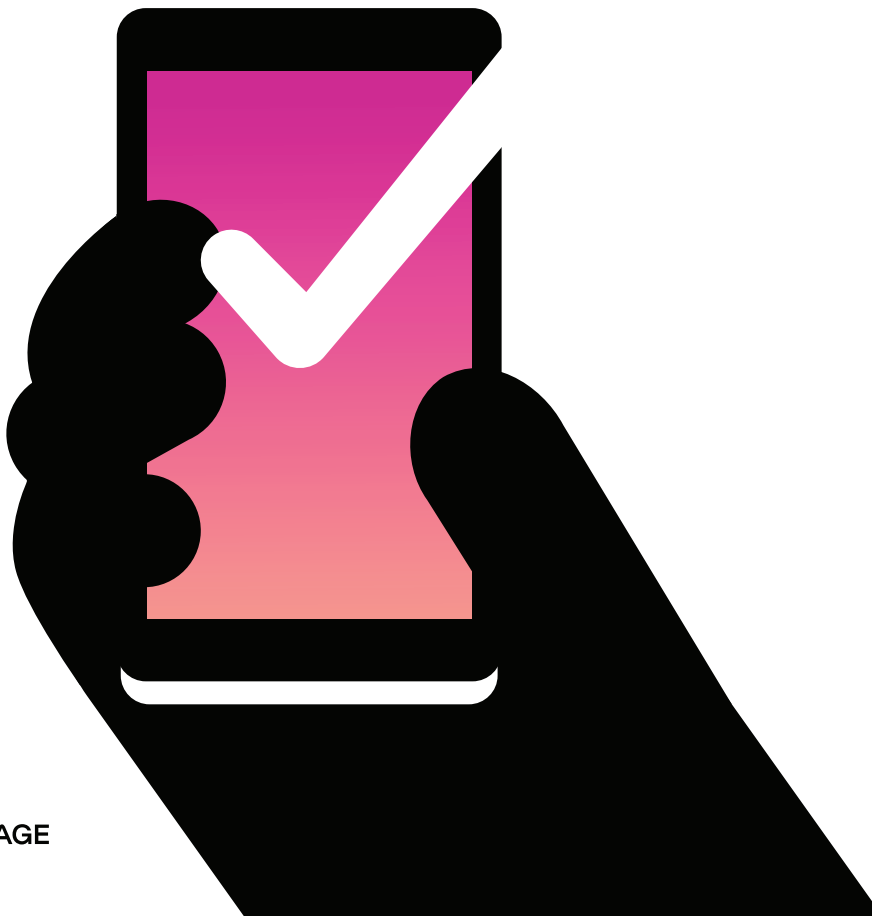
### SCENARIO 1

Vonage Contact Center for Salesforce can help suppliers with large quantities of repeat orders. For example, a major fuel company uses Vonage to allow store managers to record fuel tank readings in the IVR without any need to speak to an agent. This information is then placed into Salesforce with the customer record, triggering new shipments when required.

### SCENARIO 2

Mobile phone service providers handle many calls from customers on pay-as-you-go contracts. In order to top-up their balance, customers would call in to speak to an agent. Vonage Contact Center for Salesforce handles these calls completely in the IVR, including taking payment and adding credit detail to the account. When the call comes in, the intelligent IVR can check the available balance on the account and, if low, offer an automated top-up service.

**Allowing customers to serve themselves and also to update and interact with your business through the IVR is a powerful addition to your service delivery. It reduces the number of calls reaching your contact center. And it lowers your costs to serve and improves the experience for both your customers and your agents while providing further up-sell and repeat sale opportunities.**





## Call Back Service

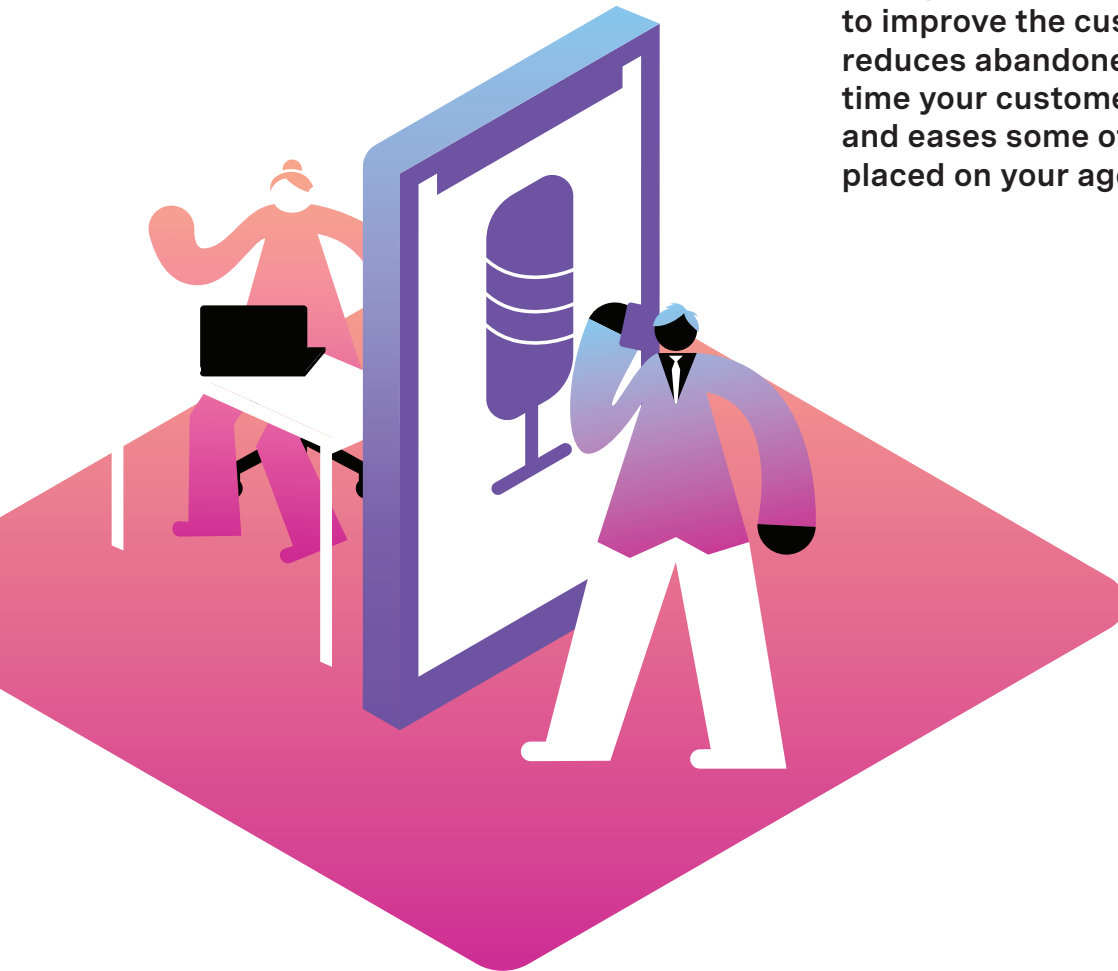
Being stuck in an endless queue is an infuriating experience. Often, you are left unsure of your place in the queue or how long you can expect to wait.

Vonage's intelligent IVR technology can more effectively manage your inbound call traffic and queues. Offering your customers a call-back service means they can avoid the wait and you can even cut the peaks and troughs of traffic into the contact center.

### SCENARIO 1

A customer calls in to your contact center at the busiest time of the day. There are many people in the queue and the customer doesn't have the time to wait on the phone. Vonage Contact Center for Salesforce offers your caller the chance to request a call back and perhaps leave some information as for the reason for the call. This is logged in Salesforce and routed to an agent. As it reaches the agent, the record is screen-popped to display all the customer's information the agent will need to call back and give first-class service.

**Giving your customers the chance to press a button to choose not to queue, record a message, and leave their telephone number to request a call back is an excellent way to improve the customer experience. It reduces abandoned calls, minimizes the time your customers waste on the phone, and eases some of the stresses and strains placed on your agents during busy periods.**



## Flexibility

Making changes in traditional IVR infrastructure can be complicated, often resulting in calling a specialist and paying specialist prices for the privilege. These changes are often regimented and inflexible, generating static menus and directing traffic down fixed paths.

Vonage Contact Center for Salesforce helps you react in real time to information changes in your customer records. This makes it simple to offer personalized menus as discussed earlier.

Due to the speed and ease of making changes, Vonage is a valuable asset in dealing with customer service demands. Whether it's an emergency or simply a seasonal message you wish to broadcast to your customers, Vonage allows you to do so simply.

### SCENARIO 1

A mortgage broker has decided to up their interest rates. This will no doubt flood the contact centers with calls about this topic. Vonage Contact Center for Salesforce allows you to quickly add a voice prompt in the IVR targeted at the customers calling in about increased rates. This can help alleviate the calls coming through to agents or even offer customers the chance to priority route to the front of the queue.

### SCENARIO 2

A customer calls in to check the progress of an open ticket. Vonage Contact Center for Salesforce finds an open case related to the customer. The customer is asked in the IVR if they are calling about that particular case and offered the chance to be routed immediately to the agent managing their case. After the conversation with the agent, the case is resolved and closed. The customer then calls back a little later—and in the IVR, the message and menu option have changed to inform the customer that their open case has been closed and resolved.

**The cloud introduces a level of flexibility and agility capable of driving major service improvements. Vonage Contact Center for Salesforce enables truly personalized service that reduces the customer effort and improves their experience.**



# The Benefits

## Improve the agent experience

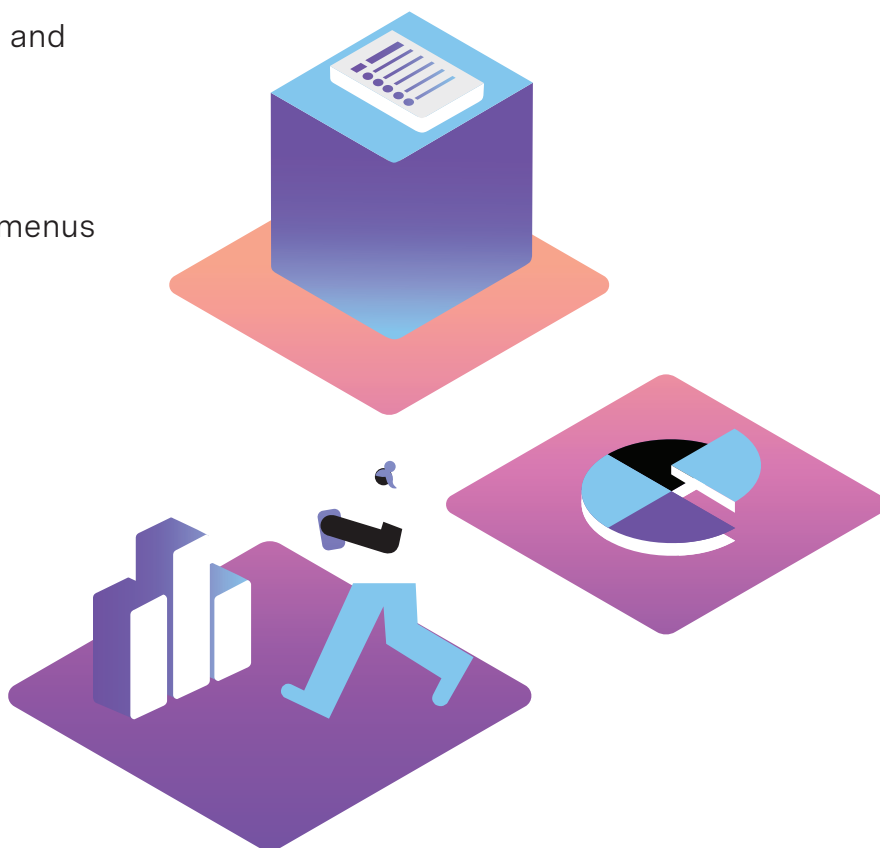
- Reduce repeat calls on mundane tasks
- Keep agents handling calls in their field of expertise
- Speed up customer identification and verification
- Allow agents to easily up-sell and cross-sell intelligently
- Improve management of busy periods

## Improve the customer experience

- Speed up customer identification and verification
- Increase first-call resolution
- Reduce handle times
- Deliver personalized and flexible menus
- Introduce call-back service
- Allow customers to self-serve

## Enjoy direct business benefits

- Reduced costs to serve
- Reduced operational costs
- Reduced average handle times
- Improved customer satisfaction scores
- Improved customer experience
- Improved customer loyalty
- Improved agent morale
- Increased cross-sell and up-sell
- Increased customer spend
- Improved first-call resolution



# Summary



**Good service is all about reducing the customer effort and making it simple to do business with you. An intelligent and dynamic IVR presents an excellent opportunity to do just that.**

It's time to stop thinking about the IVR purely from the business perspective and start designing it to meet the needs of your customers. It's not about presenting what services you offer and what departments you have—it should be about making the customer happy and reducing effort. The language you use and the options you present in the IVR have a dramatic impact on customer perception and the quality of service they expect from your business.

Vonage Contact Center for Salesforce presents a wealth of benefits that not only improve service levels, but also reduce operational costs. Personalization becomes a tangible and real prospect and you can even implement simple self-service. The beauty of Vonage's intelligent IVR is its flexibility and agility to react—in real time—to any changes in customer data. Put yourself in your customers' shoes, consider the service you would like to receive—and then implement those changes with intelligent IVR technology.

And remember: No situation is ever static. Vonage technology allows you to run trials, experiment, and test repeatedly. This ensures that you always deliver the highest level of service to your customers.

## About Vonage Contact Center for Salesforce

Welcome to a new category of cloud contact center software, designed for Salesforce, where customer interactions blend with customer data to deliver an unparalleled, emotive, and conversational customer experience.

For more information visit [vonage.com/contact-centers](https://vonage.com/contact-centers).