



Choosing a Salesforce CTI Solution for Exceptional Contact Center Performance

As technology and customer expectations evolve, it's never been more important for contact center agents to be able to access, use and input information on the spot. We live in a “now” world—if it's not instant, it's not good enough.



That's especially true when a customer is on the phone. Telephony support allows agents to make an instant personal connection and solve issues in an agile fashion, but it comes with a downside: delays stick out like a sore thumb. There's no way to hide an agent pausing the conversation to look up a customer's record in Service Cloud, or having to dig through multiple cases to remember the result of past interactions. That means agents absolutely; positively need critical customer data as soon as they say “hello.” But how can they get it?

The answer is computer-telephony integration—or CTI. It's a two-way sync between Salesforce and a telephony or VoIP system, delivering a number of benefits:

- As soon as an incoming call is recognized, it can be matched to a Service Cloud, Sales Cloud or Marketing Cloud object, and data (customer name, history, preferences, etc.) and can be delivered to the agent's screen *instantly*.
- Cases, tasks and other Salesforce records can be created automatically depending on pre-set business rules.
- Agents can call a number defined in a Salesforce object with a single click.

In other words, Salesforce CTI is a fantastic tool for improving agent efficiency and delivering better service faster—and the AppExchange is full of solutions purporting to offer it. Unfortunately, they're not all created equal; however, we'll weigh in on how to pick the best one.

CTI Must-Have #1: Efficient Call Handling

When it comes to the customer experience, every second matters. That means it's absolutely imperative that a best-in-class Salesforce CTI platform deliver as much data (and access to data) as possible. You'll want one that can run the gamut of your Salesforce instance, searching the entire content of objects like:

- Accounts
- Leads
- Contacts
- Opportunities
- Cases

You'll also want to be sure that the platform can post back to Salesforce efficiently, creating cases, tasks, posts or contacts automatically or through agent intervention.

If your CTI solution can do that, it opens essentially your *entire* Salesforce instance to call center agents, and ensures they'll never need to awkwardly delay a call or place a customer on hold to look something up or perform an action. A more personalized, customized experience that's faster sounds pretty good, right?

CTI Must-Have #2: Rapid Deployment

Every Salesforce CTI solution requires some time to set up, but the amount required varies dramatically. You'll want to shoot for a middle ground: Products advertised as "plug and play" probably aren't very full-featured, and anything requiring much custom code will take months to deploy (and probably break before long). Deployment of solutions in the sweet spot probably takes a few days, or a few weeks for highly complex Salesforce instances or unusual telephony setups.

CTI Must-Have #3: Robust Connector Library

There are two main benefits to choosing a CTI vendor with a large library of pre-built telephony system connectors. First, pre-built connectors eliminate the vast majority of coding required to tie into a system, speeding deployment (see Must-Have #2). Second, it's an insurance policy for you. If you're using a Mitel call center telephony system today but decide to switch to Broadsoft at some point in the future, you don't want an expensive, disruptive project to re-connect to Salesforce.

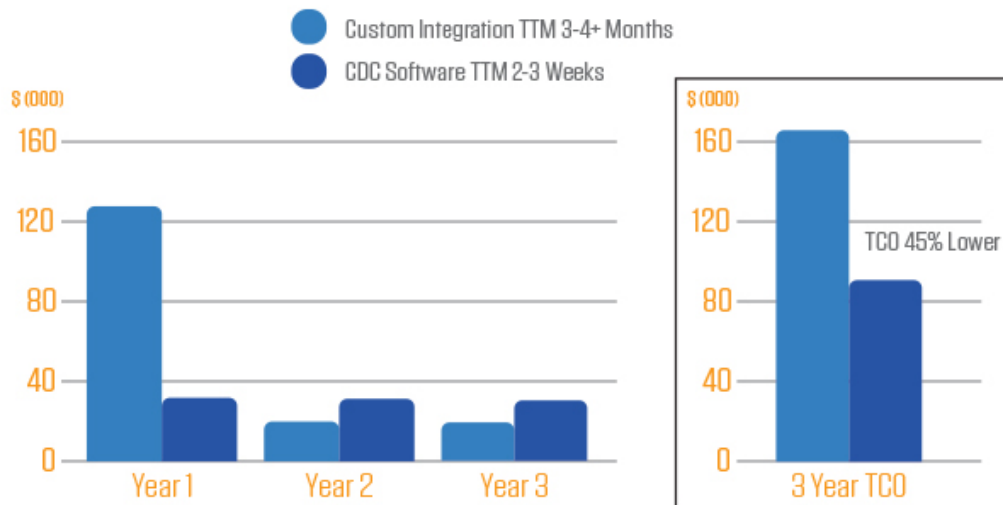
At a minimum, you'll want support for these leading telephony platforms, as well as a connector to a universal integration system like Mulesoft for corner cases.



CTI Must-Have #4: Fair, Flexible Pricing

The last thing any enterprise wants is a massive up-front expenditure for an integration project. Cash flow-friendly subscription models are in vogue for a good reason: they offer flexibility to scale up or scale down, they're predictable, and they tend to significantly reduce total cost of ownership. Here's how CDC Software's Salesforce CTI pricing, for instance, compares to the long-term cost of a custom integration project. The difference, both up front and over time, is stark:

- Amazon Connect
- Avaya Blue
- Avaya Red
- Broadsoft
- Cisco
- Digium Asterisk
- Digium Switchvox
- Fonality
- inContact
- Genesys
- Mitel
- Nokia
- Shoretel
- Siemens
- Skype for Business
- Vonage Business



Conclusion: Defining the Ideal Salesforce CTI Solution

With the breakneck pace of today's world, there's absolutely no substitute for delivering call center agents Salesforce data instantly, and eliminating manual processes when writing back into the CRM or helpdesk system. If you use Salesforce, CTI is a must – period. Unfortunately, not all Salesforce-telephony integration solutions are equal. Many don't support all of Salesforce, hampering agent efficiency. Others are based on custom coding work, which is expensive, time-consuming and prone to breakage. Still others don't support a full list of leading telephony systems, limiting their usefulness now and in the future.

There is one that checks every box, however: **CDC Software**. Available now in the AppExchange, CDC features:

- Support for all leading contact center phone and VoIP systems, both on-premise and in the cloud
- Access to all relevant Salesforce data
- Out-of-the-box support for the Lightning Experience interface
- Monthly, seat-based pricing
- Click2call functionality for any phone number defined in an Account, Lead, Contact or Opportunity
- Custom reporting and call center analytics
- Proven, future-proof back-end technology

Ready to Get Started?

[Check out our listing on the AppExchange](#), or visit CDCSoftware.com to learn more. We're also available via phone at 570-309-6827. We look forward to helping you and your agents get the most out of Salesforce!