

# Optimizing Performance:

## Integrating CRM and Custom Applications into your Call Center

No two call centers are exactly alike, but they all share a common need: to achieve the flexibility to respond to changing client demands while keeping a sharp eye on the bottom line. The rapid growth in communication technologies over the last few years has presented call centers with an unprecedented opportunity to support complex customer interactions. Independent applications, tailored to manage the business process of customer interactions, have an increasingly important role in daily call center operations and are used extensively to perform crucial duties that significantly improve productivity. However, since such applications tend to operate independently of the call center software, many are asking the prevalent question: "how do we setup a flexible contact center technology platform to optimally integrate these custom applications and tailored Customer Resource Management (CRM) systems?"

This paper will explore the need to achieve this level of flexibility and will define the essential requirements needed to efficiently support integrations to CRM and custom applications. It will outline the benefits of employing software capable of delivering these optimizing features. It will also introduce Q-Suite, a next-generation call center software for Asterisk, which is capable of providing tight integrations to your CRM and custom application, thereby optimizing performance, delivering agility, and positioning you for success in a competitive market.

### Customer Interaction: Optimizing for Agents

Optimizing how agents interact with the customer is an important ingredient for efficiency. Therefore, the first thing call centers need is the ability to script the interaction to ensure it

“The Script Builder within Q-Suite stands out as one of the most powerful and versatile script building tools available with any call center software”

follows the optimal business process. “The Script” is a common component provided by most call centers to their agents. For both inbound and outbound operations, the need to create powerful scripts that provide the direction and flexibility required to build quality customer interactions remains high on the list of priorities.

The primary function of a good script is to enable the agent to perform the full realm of their duties from a single interface, and to do it in a timely fashion that provides the agent and customer with the confidence that comes from a positive interaction. This will allow the agent to focus fully on providing a superior customer experience each and every time.

High quality scripts deliver more than just scripted text. For example, Knowledge Management (KM) comprises a range of strategies and practices used in an organization to

identify, represent, create, distribute, and enable adoption of insights and experiences, and is proven to assist agents in their handling of the customer interaction within a call center. As such, the call center software must deliver the ability to translate KM into usable scripts using a Script Builder. It is essential that the Script Builder be capable of developing scripts that can incorporate KM in order to handle increasingly complex and diverse interactions.

## **Web Enabled CRM and Custom Application**

Many mature business verticals have well developed CRM or Custom Applications that hold the KM. When such businesses add or upgrade their contact center, it is imperative that the CRM and the call center software work together in a way that enables the agent to handle customer interactions without navigating from window to window when collecting the required information for both systems.

CRM and custom applications should be Web enabled and capable of accepting command line parameters. This will allow for easy integration into the script, provided the scripting tool of the call center software is capable of displaying an opened web page based on appropriate customer data. Such an integration allows the agent to work efficiently from one screen.

## **Integrating CTI (Computer Telephony Interface)**

If the custom application is driving the customer interaction, it is possible to embed the Computer Telephony Interface (CTI) into the custom application. Here the custom application dictates the course of the customer interaction with the CTI confined to the telephony aspects of the call handling. This is generally a larger undertaking than incorporating a Web enabled application.

## **Script Builder within Q-Suite**

There are a number of features that enterprise-grade script builders should have. You will want to be able to easily insert web contents within the script. This enables agents to fully interact with web enabled applications, including web-enabled CRMs, from within the script itself.

Indosoft's Q-Suite provides call center features that enable contact center platforms based on Asterisk IP telephony to deliver the power, innovation and flexibility needed for increasingly complex customer interactions. It is geared towards building strong customer relationships, while dramatically reducing ownership costs. The amount of software needed for today's converged contact center technology platform is immense. Available as a multi-tenant software for both on-premise and hosted deployment, Call Center Software Q-Suite leverages the advantages of Asterisk, Linux, Apache and MySQL to provide an open architecture with unsurpassed functionality required for any next-generation contact center solution.

## Overview of the capabilities of Q-Suite Script Builder

Script builder is a very powerful tool available within Q-Suite for use with Web browser Agent screens. It can be used to generate effective scripts for agent-customer interactions. A few of its popular functions include the ability to insert text boxes capable of using data inline from a database, create custom fields for use within the script, and display script pages based on conditional responses. Pulling data, such as a name or customer status or order history, and making that data visible to the agent based on the interaction with the caller, allows for the development of interactive scripts.

Similar to pulling data from a database, the Script Builder will allow you to insert data posting functions within the script itself. With a Post URL function, agents can input information received during the call to their agent screen. Once the call is finished, the data will post to the indicated URL. This important feature allows for a number of benefits. The most direct benefit is the ability to fully utilize the call center software's performance tracking tools to generate accurate performance reporting. Another benefit includes better data management.

The ability to create, store or display custom fields is fundamentally essential for every contact center operation. Many scripts require the capability to hide or display elements based on condition responses to prior fields within the script. Q-Suite provides you with complete control over custom fields and conditional displays.

## Conclusion

Customers are increasingly demanding improved service with real-time resolutions of their problems and immediate answers to their questions. As such, it becomes imperative to provide agents with all the tools necessary to successfully manage each and every customer contact. Uniting the agent duties within a single interface remains one of the single most important steps in optimizing any call center's performance.

Furthermore, a recognized reason for providing these tools is their proven ability to reduce the high costs associated with agent turnover. It is expensive to continually hire and train new agents, as well as potentially damaging to a company's brand, as newer agents tend to be less prepared when interacting directly with customers.

### Q-Suite Script Builder Overview:

Q-Suite Script Builder Component Matrix	
Component	Description
Multi-tab	Multi-page Scripts within the script area of the web browser agent.
Static Pages	Static Web pages like Maps and FAQs on separate tabs.
Drag and Drop	The Script Builder offers a drag and drop capability to build your script. It is a What you see is what you get (WYSWYG) tool.
Conditional Display	Every element within the script can have conditions attached to determine if the element will be displayed or hidden. The conditions are generally tied to the value of the preceding entries in the Script, such as a customer response.
Text Box	Inserts a text box capable of utilizing data inline from a database.
Custom Variables	Create your own custom variables like TEXT, NUMBER, LOV (List of Values) etc. and use it within the scripts and outside the script.
Start/Stop Recording	Inserts an action to start or stop audio recording of the call. The recording can be initiated by the agent clicking a button or by the page loading.
Post to URL	This tool allows the agent to upload information to a website or an external application capable of receiving posts.
External URL	The access to the external web page appears as a link within the Script.
CRM Integration	Web applications and CRM capable of accepting command line parameters can be integrated directly into the script. Within a script the CRM Web application can be displayed through an I-frame or through a new window.
Branching	Script control can branch to a different page.
Initiating Call Transfers	Blind, Conference and Consultative transfers.

### ***A Final Word***

The paradigm shift in technology has opened an unprecedented opportunity to enhance your call center platform, lower your cost and provide much more functionality. There has been never such an opportunity to compete and grow with industry leaders. In order to take full advantage of what cutting edge technology can deliver, a close analysis of Asterisk and Q-Suite should remain central to your search for a next-generation contact center technology platform.

*There are a number of resources to help you learn about the benefits of Asterisk. In addition to the reference materials available at [www.indosoft.com](http://www.indosoft.com), you can find valuable information here:*

*Asterisk Website*  
[www.asterisk.org](http://www.asterisk.org)

*Commercial Asterisk Support*  
[www.digium.com](http://www.digium.com)

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### **About Indosoft**

Indosoft is a global provider of call center software for Asterisk. It has been providing call center solutions to medium and large contact centers around the world for over nine years. It also licenses its ACD for Asterisk with .NET and socket library to enterprises utilizing Asterisk in their product line. Indosoft has been making available Q-Suite ACD for private label contact center technology solutions.

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