



The Advanced Guide to Salesforce Telephony Integration

How to Compare Salesforce Open CTI Adapters

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Introduction:

Welcome to the complete guide on Salesforce CTI. Everything you need to know about Salesforce CTI is contained within these few pages. This guide has been specially created to take you through understanding what it is and how it works, to the benefits to be realized through implementing Salesforce CTI.

Whether an inbound or outbound environment, Salesforce CTI offers some alluring benefits. Connecting all your rich customer data with your communications can only be a positive thing, and this guide will help you realize just how beneficial it really is.

In this guide you will learn:

- What exactly Salesforce CTI is
- How companies are implementing Salesforce CTI and the results
- How to set up a Salesforce Contact Center with Salesforce CTI
- The power of Salesforce CTI for service and support
- How to compare Salesforce CTI vendors
- What benefits you can expect to see from Salesforce CTI
- The new features available to you after implementing Salesforce CTI
- The power of Salesforce CTI for inside sales
- How Salesforce CTI can be powerful for small and growing businesses

CHAPTER 1:

What is Salesforce CTI and why should you care?

What is Computer Telephony Integration or CTI?

CTI, or computer telephony integration, is a fancy term to describe connecting your telephone systems and computers. It describes two types of function:



Desktop-based interactions which are designed to help users be more efficient



Server-based functionality such as automatic call routing

Computer telephony integration is particularly beneficial in the world of inside sales and the customer service Contact Center.

The History of CTI

Computer telephony integration began in the 1970's with the advent of the automatic call distributor (ACD). ACDs were used to distribute incoming calls to select agents based on certain call parameters like the number dialed or the time of the call.

In addition to distributing calls, organizations also wanted to improve the efficiency of Contact Center agents by matching incoming phone calls with relevant information stored in their customer databases. CTI allowed data collected by the phone systems, such as the caller ID or automatic number identification (ANI), to be used to query databases—such as the CRM—and populate that data on the screen of the customer services team.

Initially, CTI was implemented by installing software on a physical computer or device like the company private branch exchange (PBX).

At its inception, there were many different standards of CTI across the industry, with each PBX / ACD vendor using a slightly different variation. These standards

included CSTA, JTAPI, TSAPI and TAPI to name just a few. For fear of blinding you with telecommunications acronyms, it is simpler to say that it was a complex market with many individual technologies requiring custom integrations to link phone systems and all the rich customer data in CRMs.

In order to understand the evolution of CTI, it is important to remember that, at first, enterprise software, like CRM systems, as well as telephony equipment and software, were all installed on-premise, at an organization's office or data Center.

This began to change with the emergence of software as a service (SaaS), where companies could deploy and manage enterprise software, like Salesforce, in the cloud. Following suit, a new breed of Contact Center software companies, like NewVoiceMedia, began to offer fully integrated telephony solutions through the cloud. Cloud Contact Center software included ACD, interactive voice response (IVR), CTI, call routing and CRM integration, which providers could easily deploy and manage.

However, in order for a SaaS CRM system like Salesforce to work with a cloud Contact Center solution, users had to install a CTI adapter program. A CTI adapter is a light-weight software program that controls the appearance and behavior of a softphone and allows agents to place calls, answer calls and transmit audio, using features of the physical (on-premise) computer.

This presented a problem—especially for a company like Salesforce whose slogan is “No Software”. It forced application developers to use a CTI adapter toolkit, which required software to be installed. That conflicted with the overall goal of removing on-premise software. Software applications caused organizations to face security issues from applications like Java, which could provide a point of vulnerability. It also made management more difficult as software had to be installed and upgraded on each agent's desktop computer.

That led Salesforce to introduce Open CTI.

CHAPTER 2:

What is Salesforce Open CTI?

In June 2012, Salesforce introduced Open CTI with their platform—a cloud based CTI solution that leverages the existing Salesforce API and removes the need for a software-based adapter.

Open CTI enables third party developers to build custom softphones that sit within the Salesforce page layout. Technology providers that had previously used CTI adapter had to rewrite their code to run in the browser instead of on the computer.

When NewVoiceMedia, now Vonage Contact Center, first designed its CTI integration with Salesforce, it used Salesforce's existing telephony integration API to allow NewVoiceMedia's cloud-based telephone to communicate with Salesforce's sales and service clouds. For customers, this meant little change as its integration had been designed from the start using the Open CTI approach.

In fact the term "computer telephony integration" has now become somewhat outdated. Open CTI really enables cloud to cloud telephony integration where CRM software in one cloud communicates with telephony software residing in another cloud.



CHAPTER 3:

What are the benefits of Salesforce Telephony Integration?

Salesforce telephony integration brings your communications platform inside Salesforce to create one complete customer success platform and brings you these amazing benefits:

For Sales:

The Ability to Reach More Prospects

Engaging with more prospects is a top priority for any sales team. The more prospects you reach, the more opportunities you'll create, the more revenue you generate. If you use Salesforce to store the leads generated by your marketing team, your sales reps need a way to quickly and efficiently reach those prospects over the phone.

Computer telephony integration removes the need for manual dialing, which can be slow and cumbersome. Telephone numbers associated with any Salesforce object, including leads, contacts, and cases turn into clickable links, which your team can use to place outbound calls. Automated dialers can also be used to place calls for your sales reps using lead lists that you create and store within Salesforce, helping your team make even more calls.

Not every lead answers the first time and routine voicemails take time away from your team's call downs. Salesforce telephony integration solves this by providing a voicemail drop for pre-recorded messages.

Of course, having your prospects answer the first time is always preferable, and Salesforce telephony integration can help with that as well. Most people refuse to answer calls from unfamiliar phone numbers. With Salesforce telephony integration, you can use local caller IDs so that your phone number matches the geographic region you are calling, helping to improve pickup rates.

Improved Lead Conversion

It's pretty straight forward. The more your reps know about a lead, the more they can tailor the conversation to the prospect. That, in turn, helps them to convert more conversations into sales opportunities.

By integrating your telephone system with Salesforce, your reps can preview all of the information you have about a prospect before placing a call. Information like company, job title, geographic location, which products they've purchased in the past and even their LinkedIn profile can be quickly reviewed.

For inbound calls to your sales department, caller ID, the number dialed and any information collected through your IVR can be used to pull up valuable information about the caller. That information can be displayed to the sales rep through a "screen pop" within Salesforce.

Increased Use of Your CRM

By integrating your phone system with Salesforce, you will increase your sales team's usage of your CRM. That will give you with a complete view of all sales activity. Sales reps often place calls from cell phones or desktop phones that are not integrated with your CRM, which means their calls can't be logged, recorded and tracked. By having your reps make all calls from a soft phone or desktop phone that is integrated with Salesforce (or from the Salesforce1 mobile application), those calls will all be automatically logged and tracked. That makes it easier to review sales activities like how many attempts were made to reach a prospect. It also allows you to review calls for quality and training.

Improved Sales Team Performance

Sales managers can optimise team performance through Salesforce dashboards that track key performance indicators (KPIs) like the number of calls made, average call duration, meetings booked and opportunities created. This can help you measure individual and team performance and determine which reps might need coaching.

But a truly effective inside sales team is one that is engaged and highly motivated. Contact Center software that is integrated with Salesforce not only helps you record and track sales activity, it can also help you “gamify” your sales process. Gamification can help you understand the behaviors of your best performing sales reps and offer incentives to other team members that will help them to improve performance.

For Service:

Offer Callers Simple Self-Service or the Option to Connect to a Live Agent

Some types of customer service are best provided with zero agent touch, where your customers can simply serve themselves. Using interactive voice response (IVR) that is integrated with Salesforce, you can connect your rich customer data to your communications platform, allowing you to provide self-service options along with the ability for a caller to be connected to a live agent.

Route Calls From Your Toll-Free Phone Number

People call businesses for many reasons and usually on their most public number, expecting to get immediate service from a qualified agent. Contact Center software that is integrated with Salesforce includes ACD functionality, which allows you to route calls based on the caller’s phone number or the number dialed to the appropriate agent. Salesforce CTI lets your communications platform query your customer database. Using that information, you can dynamically route incoming communications based on anything you know about a customer—whether it is the product they bought, where they are in their contract or if they have an open support case.

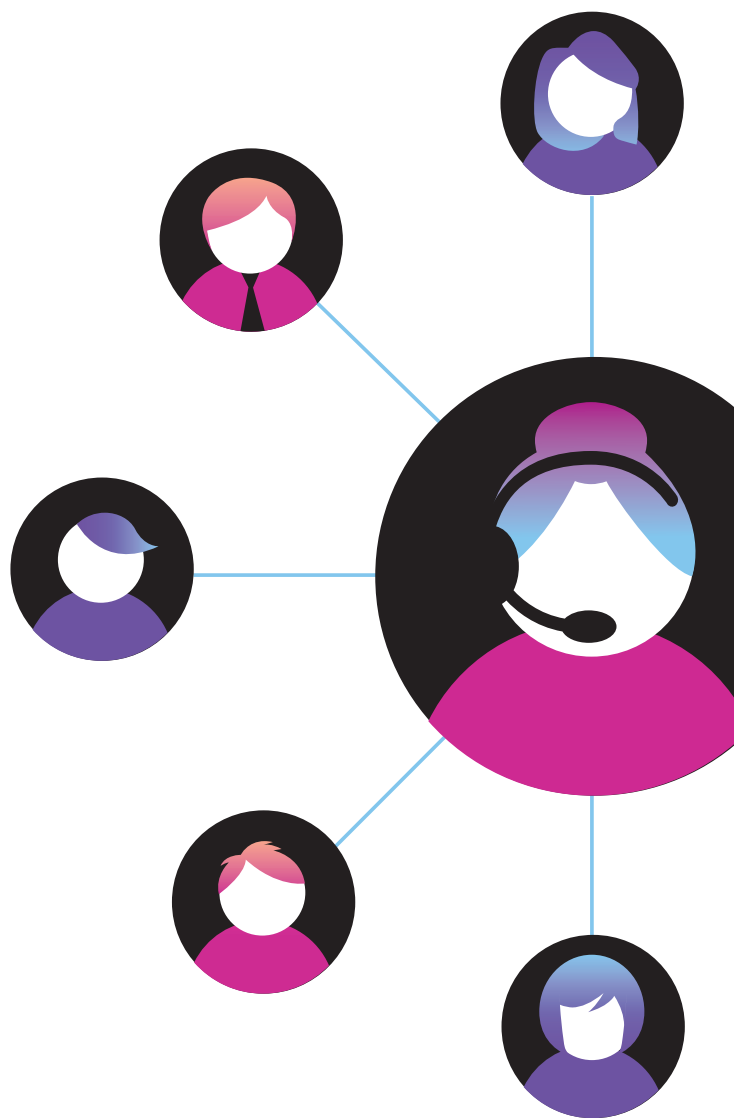
You can also allow the caller to select the person or department that they want to connect to through an integrated IVR by, for example, pressing 1 for service or 2 for sales.

Reduce Your Call Handle Times

By providing immediate access to the information you have stored in your CRM, along with incoming calls, you can reduce the amount of time it takes your agents to resolve issues. That will drive down handle times while improving customer satisfaction.

Monitor, Measure and Maximize Contact Center Performance

With Contact Center software that uses Salesforce CTI, you can view reports and dashboards from within Salesforce that combine all of your service metrics. You can see all of the standard Contact Center metrics like average handle time, time in queue, dropped calls and talk time. By combining the data you have about your calls with the information you have in Salesforce, you can also dig deeper to see things like how many calls it took to resolve an open case. And by reviewing detailed reporting on your agent and team performance, you will be able to improve training and coaching.



CHAPTER 4:

Proving the value of Salesforce CTI



Case Study: Learn how JustGiving integrated telephony with Salesforce and improved their customer support

"We aim to give our users the best possible experience when giving online, so being able to recognize callers and deliver a personalized service is invaluable. Providing excellent customer support is so important to us, and with [Vonage] we are handling calls more efficiently and improving the satisfaction of our service users."

HUU ANH CHU | HEAD OF CUSTOMER EXPERIENCE
JUSTGIVING

For JustGiving, customer satisfaction is directly related to call response time. With the implementation of computer telephony integration JustGiving boosted customer satisfaction to 95 percent. They are now able deal with call fluctuations and provide the level of service demanded by callers.

[FIND OUT MORE](#)



QUINTESSENTIALLY

Case Study: Watch and learn how Quintessentially integrated telephony with Salesforce and improved their customer support

"Exceptional service is core to our business and we are constantly striving to deliver worldclass experiences. [Vonage] integrates seamlessly with Salesforce and is helping us to deliver on this vision, as we now offer a consistently personalized service."

PAUL DRUMMOND | COMMERCIAL DIRECTOR AND CO-FOUNDER
QUINTESSENTIALLY

With over 60 offices, each with its own private branch exchange, and members who travel constantly, Quintessentially needed a multifunctional global call handling solution. With a Salesforce CTI solution it was able to manage call plans and provide dynamic routing and tailored service across 35 languages for their members.

[FIND OUT MORE](#)



Case Study: Learn how Ebury integrated telephony with Salesforce and improved their sales operation

"The best outcome of the Vonage system is transparency across the sales estate. It's easy to drop in and out of the call. It's faster to educate and get junior sales teams up to scratch."

TOBY YOUNG | CTO | EBURY

Ebury is a rapidly expanding FinTech company with sales doubling year-on-year. A trusted partner for SMEs, Ebury provides a unique combination of lending, currency and payment solutions and works with over 12,000 clients around the world. Today it employs over 350 people in Amsterdam, London, Malaga, Madrid and Warsaw. With £83m of funding secured in 2015, Ebury is one of the most invested in European FinTech businesses.

[FIND OUT MORE](#)



Case Study: Learn how Axio Financial integrated telephony with Salesforce and improved their sales operation

"The Vonage Business Communications and Vonage Contact Center solutions have integrated advanced CRM related functionality into the Axio Acceleration Platform in a way that empowers our salespeople to work smartly and efficiently. Vonage has enhanced our flexibility in outbound dialing, provided reliable, high-quality voice functionality and has enabled data integration in our CRM."

RICK BAFF | CHIEF INFORMATION OFFICER | AXIO FINANCIAL

Axio Financial is a US broker-dealer that specializes in selling structured financial products, teaming with best-of-breed technology partners to help scale and innovate its business workflows and operations throughout their entire structured products lifecycle. Axio's mission is to use data, technology and people to add value throughout the entire structured products lifecycle, which means from idea generation through maturity.

[FIND OUT MORE](#)



CHAPTER 5:

Key Salesforce CTI features

An investment in Salesforce demonstrates a clear commitment to the service you deliver and the success of your customers. It also demonstrates that you understand the importance of improving the way you sell to your customers. Connecting your communications platform to Salesforce through Open CTI gives you all of these features and more:



Click-to-dial

Click-to-dial turns telephone numbers into clickable links that are used to place outbound calls removing the need for slow, error-prone, manual dialing.



Automatic Dialing (dialer)

An automated dialer allows you to create lead lists within Salesforce. Leads can then be automatically dialed for one or more sales agents, increasing the number of calls placed and the number of connections made.



Screen-Pop

Deliver your customer records along with the inbound call to your employees screen so your agents get advanced warning of who is calling, and why.



Soft Phone

Agents can make and receive phone calls using a headset, computer and Internet connection. Using a contact pad that is displayed from within the Salesforce interface, agents can place, transfer, park or conference calls.



Automatic Call Logging and Recording

Automatically log and record every call in Salesforce, ensuring you get a complete view of activity while saving your sales team valuable time.



Local Presence

Enable agents to call into any area and present a local number to the prospect to improve pickup rates.



Voicemail Drop

Inside sales reps can pre-record a voice message. If the agent reaches a prospect's voicemail system, the message can then be left automatically, saving the rep time and enabling them to move onto the next call.



Hot Desking

Allows you to integrate with existing phone systems. An agent is able to input any phone number and have incoming calls sent to that number.



Interactive Voice Response

Give callers options to route themselves to the right departments or provide them with self-service options.



Inside View of Multiple / Global Contact Centers

Operating on top of telephony platforms, cloud technology can easily sit across all of your Contact Centers meaning you can view all your data in one place, inside Salesforce.



Skills-Based Routing

Gives you the ability to create skills and assign those skills to agents. This enables you to route calls to agents with the appropriate skill set to handle those interactions.



Access to Market-leading Technology

The benefits of delivering technology from the cloud mean that the barrier of huge upfront costs has been removed granting access to great technology to all.



Intelligent Routing

Route incoming calls to the right agent using any data you hold inside Salesforce.



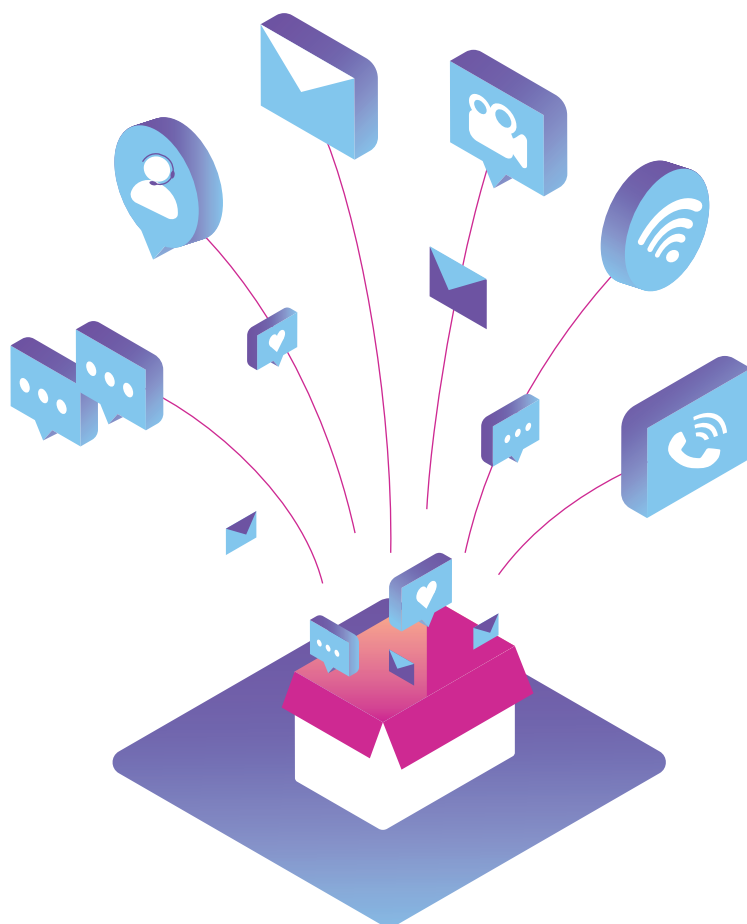
Simple Authentication of the Caller

Telephone numbers can act as an authentication method and will allow for a faster and simpler way to identify and verify callers.



Centralized and Simplified Call Reporting

All of your important telephone data is inside Salesforce. It is centralized and simple to create detailed reports for deep insight.



CHAPTER 6:

How do you set up a Salesforce Contact Center with Salesforce CTI?

It may seem like a complicated process, to integrate and deploy telephony with Salesforce, but generally it is not as time consuming as you'd expect. Outlined below are the key things to consider when implementing any Salesforce CTI project.

Managed Vs Non-Managed

First things first, you need to understand if your chosen provider offers you a managed or non-managed service and installation process. For example, at Vonage Contact Center we offer a completely managed package, meaning that except for granting us access to your Salesforce environment, which should be light work for your Salesforce administrator, we work with you to design and implement the solution. This means your involvement with the package is reduced to understanding your key requirements and being able to relay that to us.

If you chose a non-managed service provider, you will need to understand more about your exact requirements and configuration. But don't worry, this guide will illuminate all the key facets of any project and give you a great platform to work from.

Provisioning

The fundamental starting point of any project involving telephony, knowing the telephone numbers you need or want and how to make sure it is all set up and available for your chosen provider to work with.

This may be included as part of your managed package (if you have one), but if not, draw up a list of all your numbers and/or the ones you want and ensure your provider can use them or route incoming traffic/phone calls from them.

Understand Your Technical Requirements

The next step is understanding your technical requirements. You must ensure the network is capable of handling the increase in traffic as your voice channel moves to IP.

What type of interaction will your chosen cloud provider have with your existing telephony and infrastructure? Will it overlay it (like Vonage Contact Center) and be completely system agnostic, or does it require extra downloads, patches or integration work? This could be costly and a potential managerial headache. So, make sure you know upfront what you are getting from your supplier.

You will need to involve your IT or network teams at this step and test the stability and quality of your network too, making improvements where necessary. Vonage Contact Center conducts a Site Readiness Survey (SRS) for all of our customers to ensure we deliver the level of quality and excellence expected.

Access

With any technology and implementation, there will be different groups of people needing different levels of access and different features. Once you know that your network is ready to accept a cloud communications network, and your telephony has been provisioned, you need to think long and hard about your access rights.

Who needs access to what data and when? What features will your telemarketing team need versus those of your middle and senior managers? Who is going to operate as an administrator for your solution? These are all questions that need answers. Some careful planning ahead of any Salesforce CTI project will help smooth the implementation process.

It is important to consider the level of integration and access to data that your Salesforce CTI vendor will need to work. What type of data will they be pushing back in to your Salesforce? It's worth considering ahead of making a decision.

Routing and Solution Design

Now that you understand who has access to what and what everyone's roles will be, you can start to map out your routing and solution design. This stage can be as complicated or as simple as you need it to be; it really depends on the number of use cases you anticipate or require as a business.

Think about all the different reasons that your customers contact you, and then consider how you would want each of those calls to be treated as a starting point. From here, you can start to consider contextual circumstances and exemptions that mean your customers are handled differently. For example, a VIP customer may be priority routed, or a customer with an outstanding balance may be transferred directly to collections rather than their account manager.

IVR Options & Call Prompts

A major benefit of a cloud based CTI platform for Salesforce is the introduction of intelligent IVRs. By connecting your communications platform with your data inside Salesforce you can start to offer your customers personalized IVR options based on anything that you know about that person.

This opens the door for some clever and dynamic menus. So, start thinking about how you might be able to apply these to help your customers get what they need faster. Don't worry about being perfect first time; the beauty of cloud is that making changes is fast and simple.

Finally, consider the style of those messages you want to deliver to your customers, are they going to be professional or recorded internally? Think about how you want to reflect your brand, and then make those decisions accordingly. A personal and friendly tone may work for some but not for others. Find the right balance for you.

Reporting

Salesforce CTI technology effectively plugs all your communications data into Salesforce, allowing for some pretty smart reporting. With such a wealth of data and reports now available, you need to think about how you are going to extract the data you need from your new platform in a way that is meaningful.

This all comes back to the roles and access you assigned earlier: who needs which reports and dashboards? Work with your provider to help build out your reporting where possible or at least draw on their expertise to help you create some yourselves.

Testing

Ensuring that everything is implemented correctly and works as expected is a vital part of any project. Don't skip or skimp on this stage; make sure you get what you were expecting and that it works as specified in your design phase.

All Salesforce CTI suppliers should go through a rigorous testing phase, and you should absolutely push back on them if anything doesn't work as stated.

Training

The technology is only as good as the user. So, book in plenty of training time to get the best return on your investment. Think about setting up more targeted and specific sessions with fewer attendees so your staff can get quality time with the product expert to run through their typical day-to-day usage.

It is worth booking and paying for more sessions than you immediately need, because there is no doubt that people will need refreshers, and new starters will need a crash course in time.

Support

Finally, your support requirements. Your contractual agreement with your supplier will no doubt factor into your support—usually tiered depending on your expenditure. Think about what you will realistically need, and pick the service level that will best suit your requirements. Picking support based on the costs associated with it can be a slippery slope.

Think about your support logically, are you likely to need hand-holding when you start or do you think you can be up and running quickly? What will your ongoing requirements be? For example, are you growing rapidly and taking on many new staff? What type of impact do you anticipate this to have on your support needs?

As things can move rapidly, pick one for you that will still work in a few months or years.

CHAPTER 7:

Salesforce CTI opens Salesforce to be both an inbound and an outbound contact center

Salesforce CTI enables Salesforce to be used as a Contact Center. The technology plugs your telephony into Salesforce, allowing for softphones to be deployed right inside your CRM instance for each of your Contact Center agents or inside sales teams (or both of course).

What is an Inbound Contact Center?

An inbound Contact Center is set up to primarily receive communications initiated by customers and prospects. Most inbound Contact Centers are therefore customer service focused, as it is people calling in when they need assistance with a product or service.

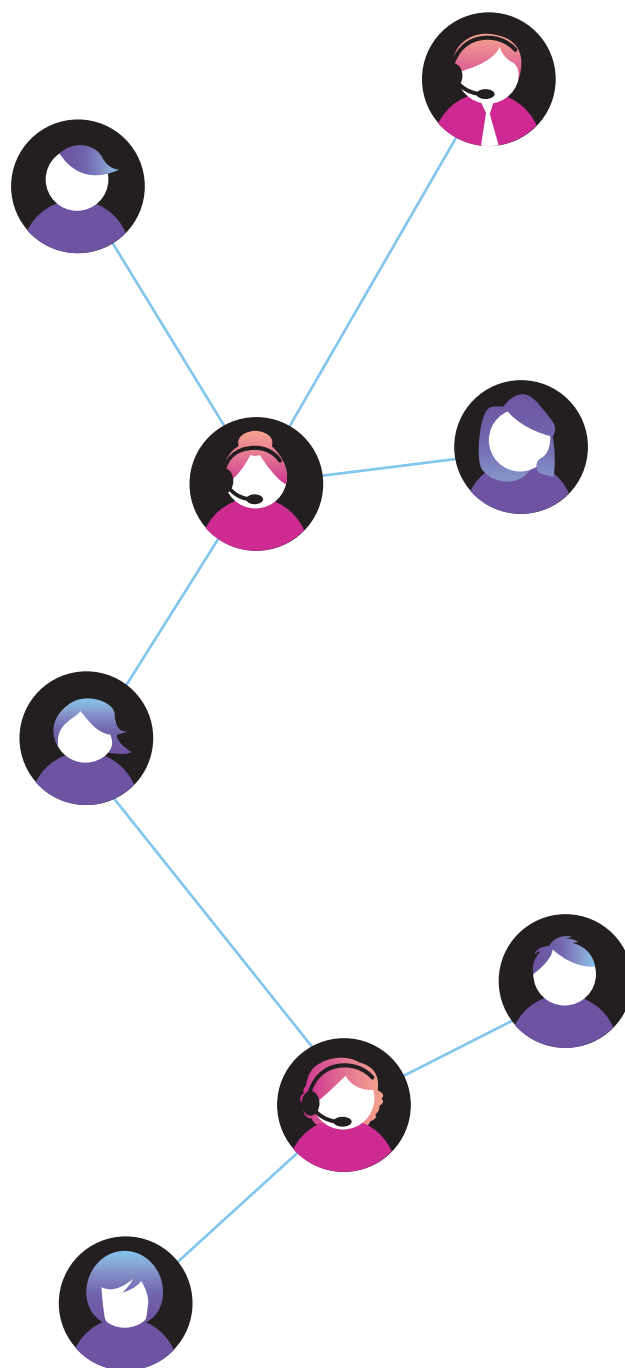
What is an Outbound Contact Center?

An outbound Contact Center is set up to primarily initiate communications and phone calls to customers and prospects. Most outbound Contact Centers are therefore sales focused, making calls to customers and prospects to try and make a sale.

What's the Difference Between an Inbound and Outbound Contact Center?

This may seem like common sense, but it really does come down to the primary direction of the vast majority of your activity in your Contact Center. If over 50 percent of your calls are inbound, then you are an inbound Contact Center.

This distinction is an important one to make as it will shape what you need from technology and what types of processes and protocols you should implement. For example, an inbound Contact Center is unlikely to need advanced dialer capability.



CHAPTER 8:

Small Business and Telephony for Salesforce

Salesforce CTI provides an easy and affordable way for small and growing businesses to gain access to state-of-the-art technology. If both telephony and CRM software reside in the cloud, they can be quickly deployed without a huge investment in IT staff to manage them. Deploying the technology from the cloud makes it easy to integrate, particularly if using Salesforce and leads to some advantageous results.

For smaller businesses, the benefits of cloud-based telephony combined with cloud-based CRM are particularly compelling:

Low Up Front Capital Investment

Businesses with limited resources benefit by not having to invest heavily in the software, hardware and equipment that would traditionally be required to support an inside sales or service team.

Pay as You Go

Small businesses also benefit by only having to pay for the agent seats they need. Traditional, on-premise systems required businesses to predict how many agents they'd need, at the period when they expected demand to be highest, and then pay, up-front, for telephony and software, often at a premium.

Allow Staff to Work Remotely

Because telephony and CRM are both deployed through the cloud, small and growing businesses can allow sales and support staff to work remotely, even from home, using a headset, computer and Internet connection. This provides access to a larger and often less expensive pool of talent.

Low Maintenance

Smaller businesses can focus their attention on what's most important—building their business. With CTI integrating cloud-based telephony and CRM, they no longer need to worry about upgrading software or replacing equipment—all that's done for them.

Always Run the Latest and Most Advanced Software

Because software is managed in the cloud and upgraded automatically, businesses are able to take advantage of the latest features to help them improve service and increase sales.

Using Salesforce CTI to merge telephony with Salesforce not only makes it easier to manage the technology infrastructure, it also delivers benefits that will help the bottom line.

If you run a growing business, you already know the importance of winning new customers and keeping your existing ones happy. To be successful, you have to give your sales and service teams the tools to make them as effective as possible.

Integrating Your Telephone System with Your Salesforce Investment You Can:

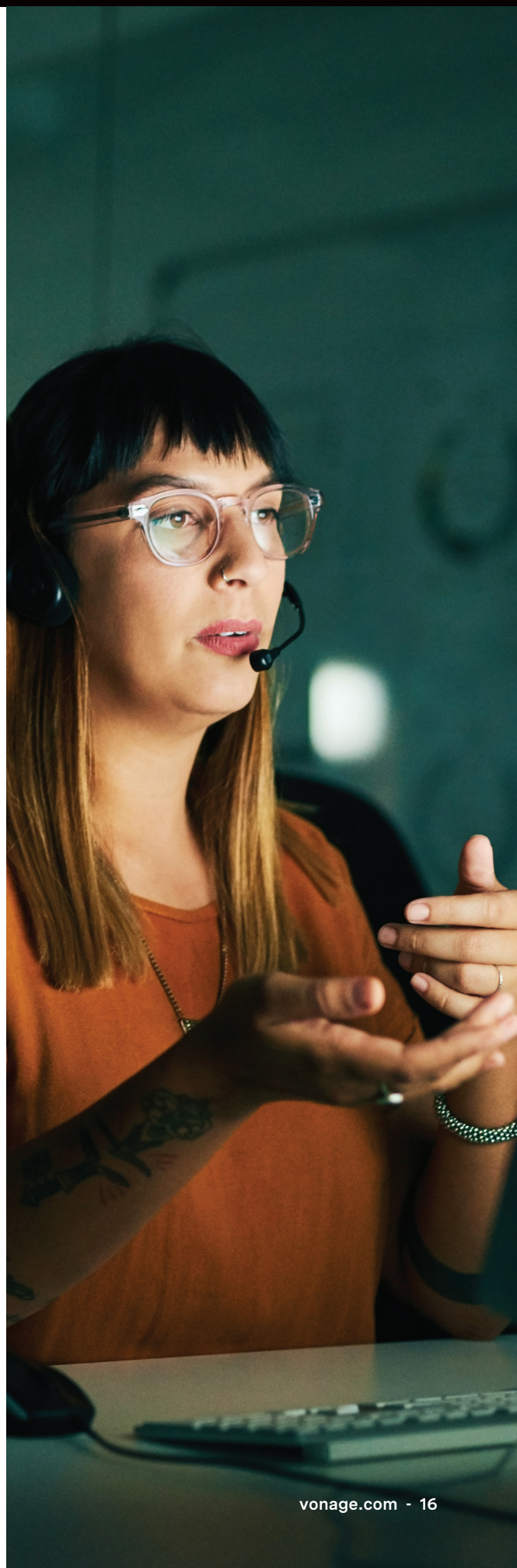
- Increase the number of sales prospects you connect with over the phone
- Improve the level of service you deliver to customers by screen-popping customer contact and case details to your service team
- Resolve customer issues more quickly by using Salesforce data to route calls to the most appropriate agent
- Improve call quality and agent performance by making it easier to listen in and support staff on or after (via recording) calls
- Improve your overall service and support levels with improved reporting on agent and team productivity

CHAPTER 9:

How do you compare Salesforce CTI vendors?

Now that you have seen the power and benefits of Salesforce CTI, you are probably considering looking at some suppliers/vendors. Outlined below are some key questions to ask:

- What phone systems do they integrate with?
- What carriers do they work with?
- Is it cloud or on-premise?
- Does it scale?
- Is it flexible?
- Is it browser agnostic?
- Is it OS agnostic?
- Does it include phone service?
- What are the upfront and/or ongoing costs?
- What are the system requirements?
- How long will it take to deploy?
- Do they own their own code?
- Is it multi-tenant / true cloud?
- Is it truly global?
- Does it need downloads or java?



CHAPTER 10:

Getting started with Salesforce CTI

Sell More. Serve Better. Grow Faster.

Salesforce CTI presents a fantastic opportunity for businesses to revolutionize the way they engage with their customers and prospects. Combining your telephony with Salesforce and your rich customer data delivers an end-to-end solution that helps companies sell more, serve better and grow faster.

NewVoiceMedia (now Vonage Contact Center), is a powerful Salesforce application, integrating seamlessly and natively right down to the custom objects in your individual instance. Available from the AppExchange® today, it's revolutionizing the way businesses engage their customers.

To see the combined power of Vonage Contact Center and Salesforce, [download our solution guide now.](#)

Vonage Contact Center for Sales helps you increase the efficiency of you inside sales teams by giving them more time, better leads and a faster close so your reps can focus on what they do best: selling. Sitting natively inside your Salesforce Sales Cloud® org it becomes the single view of the truth your sales teams need to do their job more effectively. Customer and prospect data is immediately viewable alongside a history of interactions and activities, call recordings and other valuable notes ensuring calls are always on-point.

If you are a sales leader and want to find out how Vonage Contact Center for Sales delivers more customers then [click here.](#)

Vonage Contact Center for Service is the first global, true-cloud contact center solution that delivers a personalized service to every inquiry, providing more satisfaction, better engagement and a faster resolution for your customers. Integrating your communications platform with your Salesforce Service Cloud® org provides significant benefits across your service department. Syncing customer data and communications makes it easy to offer truly personalized and differentiated service to your customers.

It reduces customer effort and improves their experience, driving customer loyalty and dramatically improving NPS and CSAT scores.

If you are a service leader and want to find out how Vonage Contact Center for Service helps you better then [click here.](#)



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