

Unified Communications CRM Integration



Enhance customer experiences with instant access to customer information from your CRM

Unified Communications CRM Integration overview

Today's organizations require fast, simple access to customer relationship management (CRM) information in order to deliver an exceptional experience to customers. Without access to customer information, the ability to efficiently personalize customer interactions is limited. The CRM integration add-on to Spectrum Enterprise Unified Communications (UC) with Webex connects your CRM system to your Spectrum Enterprise UC and Hosted Call Center solutions, automating the retrieval of customer account information for an improved customer experience.

Product highlights

- **Personalize customer engagement:** Enhance customer interactions by giving employees instant access to customer account and transaction history information.
- **Streamline operations:** Facilitate fast-efficient outreach through click-to-dial from your CRM and eliminate the need to manually switch between applications.
- **Increase sales opportunities:** Equip employees with customer information to identify and take advantage of opportunities for upselling and cross-selling.
- **Easily add on to UC:** Integrate CRM platforms with your Spectrum Enterprise UC or Hosted Call Center solutions.

Key features

- Uses Caller ID to locate and display the record within the CRM platform.
- Searches for contacts in your CRM platform, company directories, personal directories and Outlook contacts.
- Includes on-screen alerts and options to view and record customer details with a simple click.
- Utilizes click-to-dial phone numbers in CRM records for quick, convenient and error-proof outreach.
- Captures basic details of the call and automatically updates the CRM application with the option to manually add notes.
- Supports Salesforce, Microsoft Dynamics, Agile CRM, SugarCRM, Zendesk and Zoho CRM platforms.

Agent interface

The user interface displays the CRM platform through a desktop application that enables call handling.

The screenshot displays a CRM agent interface with various components and call logs. Call logs include:

- Web callback: John Smith (Zoho CRM Contact) to ABC, Co. Live Streams, Duration: 19:03:04
- Web chat: Sandy Sanchez (Zoho CRM Contact) to ABC, Co. Live Streams (Sales), Duration: 07:50
- Call: David Jackson to ABC, Co. Sales, Duration: 00:00

Annotations on the interface include:

- Identify incoming CRM calls (points to the call log)
- Auto screen pops CRM contact (points to the contact search area)
- Prioritize CRM calls in queue (points to the call log)
- Search for CRM contact (points to the search bar)
- Open CRM contact record (points to the 'Show CRM contact' button)

Learn more

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About Spectrum Enterprise

Spectrum Enterprise, a part of Charter Communications, Inc., is a national provider of scalable, fiber technology solutions serving America's largest businesses and communications service providers. The broad Spectrum Enterprise portfolio includes networking and managed services solutions: Internet access, Ethernet access and networks, Voice and TV solutions. Spectrum Enterprise's industry-leading team of experts works closely with clients to achieve greater business success by providing solutions designed to meet their evolving needs. More information about Spectrum Enterprise can be found at enterprise.spectrum.com.

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