



Digital Transformation with Cloud Integration:

Supplying Contextual Information in Real Time

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Introduction:

Unified communications offers businesses a lot of flexibility. But empowering voice communications can mean so much more with the strategic use of cloud integrations. Cloud integrations turn business processes into lean functions that unify otherwise isolated systems—ideally adding a dash of automation along the way.

Integration can mean bringing legacy business processes up to today's communications standards. But more importantly, it means taking a step forward and integrating the business applications you use every day into your communications system. By doing this, a business can support more business efficiency, manageability, and scalability—not to mention maximize the benefit of the initial investment in business software.

In general, there are four different categories of cloud integrations that can be integrated into a company's business phone system, marketing platforms, accounting software, and other cloud-based technology.

- **Customer relationship management (CRM)** has a very meaningful impact in terms of how businesses operate overall. This is the most extensive type of integration and often supports prospecting or sales functions
- **Productivity/collaboration integrations** are very popular because of their reach. They allow businesses to integrate email, chat, and other collaboration environments
- **Customer service integrations** are slightly different from a CRM in that they are more likely to support help desks or service existing customers
- **Business management** is specific to an industry. Examples include Clio legal practice management software or JobDiva which supports recruiting and staffing businesses

What all these cloud integrations have in common is contextual productivity. How can you provide a member of your team with the information they need at the moment they need it? The answer to that question will be different depending on the business role or task. The beauty of integration is that that software solution is already out there—your business may even be using it. But by integrating it into your communications platform, you create a more seamless and cohesive work environment which will continue to drive productivity.

Take a look at all the ways businesses are realizing the fruits of their digital transformation initiatives through cloud integrations.

CHAPTER 1:

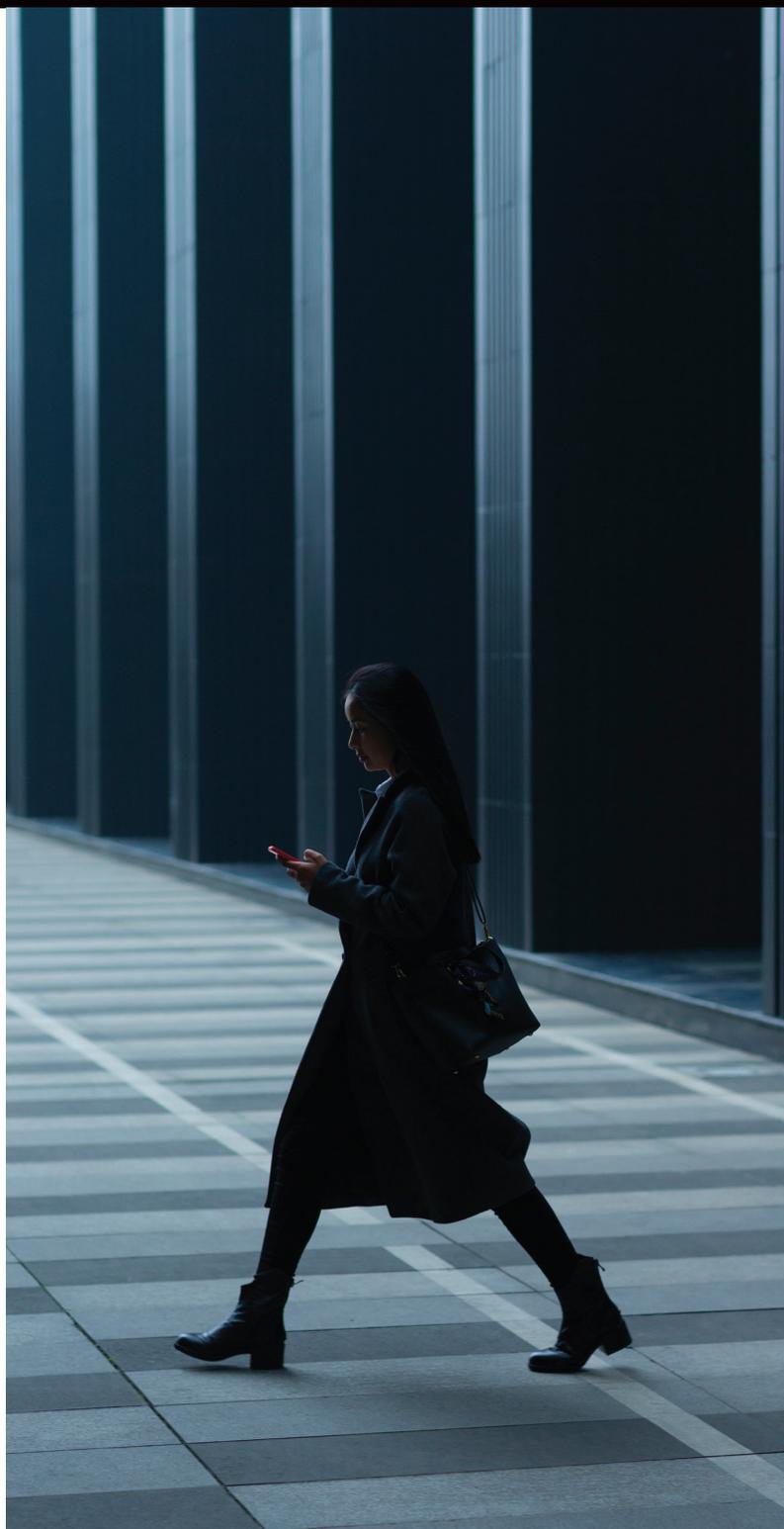
6 Benefits of CRM in the Cloud

Imagine you're a busy sales leader. You're finally at home and queuing up Netflix. Then, you get CC'd on an urgent email from one of your biggest clients to your top salesperson, who—as Murphy's Law would have it—is on vacation.

The buyer lost the final quote from your sales rep and needs it for her morning meeting with decision makers, but you don't know those numbers offhand. They should be in your CRM system, but only if the salesperson remembered to update it (and that's a big "if").

Without CRM in the cloud, you need the software on your business computer to access the information—but you left your laptop at work. Now, you have three options: You could begrudgingly kick off your slippers and trek back to the office; send a new quote, which could make your team look inconsistent and disorganized; or start calling other salespeople to find out whether anyone brought their work computer home and can look up the information for you. They'll definitely love getting that call at dinnertime.

With cloud CRM, you wouldn't have this problem, since all you'd need to access customer information is a login and an internet-connected device. A robust cloud-based CRM can help boost sales productivity, call center efficiency, and marketing effectiveness. However, like any business tool, it only works if everyone uses it, and most people will only use it if it's convenient.



The bottom line? You need accurate and complete information in your CRM. Yet your employees are people, and as a general rule, people don't love paperwork. Cloud CRM makes that part of the job quick and easy, so your team can focus on doing what they do best: selling.

Businesses both large and small are embracing this technology to take advantage of the following six **cloud migration benefits** for CRM:

1. Mobility

Whether your sales pros are working from home, traveling for business, or communicating with clients after hours, they might often need to answer business calls when they're not in front of their computers. However, they almost always have their smartphones within reach. By giving them CRM access on mobile devices, you enable them to better serve clients and work from anywhere.

2. Updatability

CRM grants businesses the ability to analyze customer interactions and data and enables sales teams to better collaborate. However, when people are taking calls on the fly, they need the ability to update CRM data on the spot. Otherwise, they might forget to do it later. CRM in the cloud is always right at their fingertips. So, short of "My dog ate my smartphone," they're all out of excuses.

3. Scalability

Smaller companies might not need all the bells and whistles that large enterprises want from CRM, but as those companies grow, their needs change. Upgrading or switching to a different CRM down the road can be costly and time-consuming. With CRM in the cloud, new capacity, features, and functionality can be automatically pushed out company-wide—no IT overtime necessary.

4. Affordability

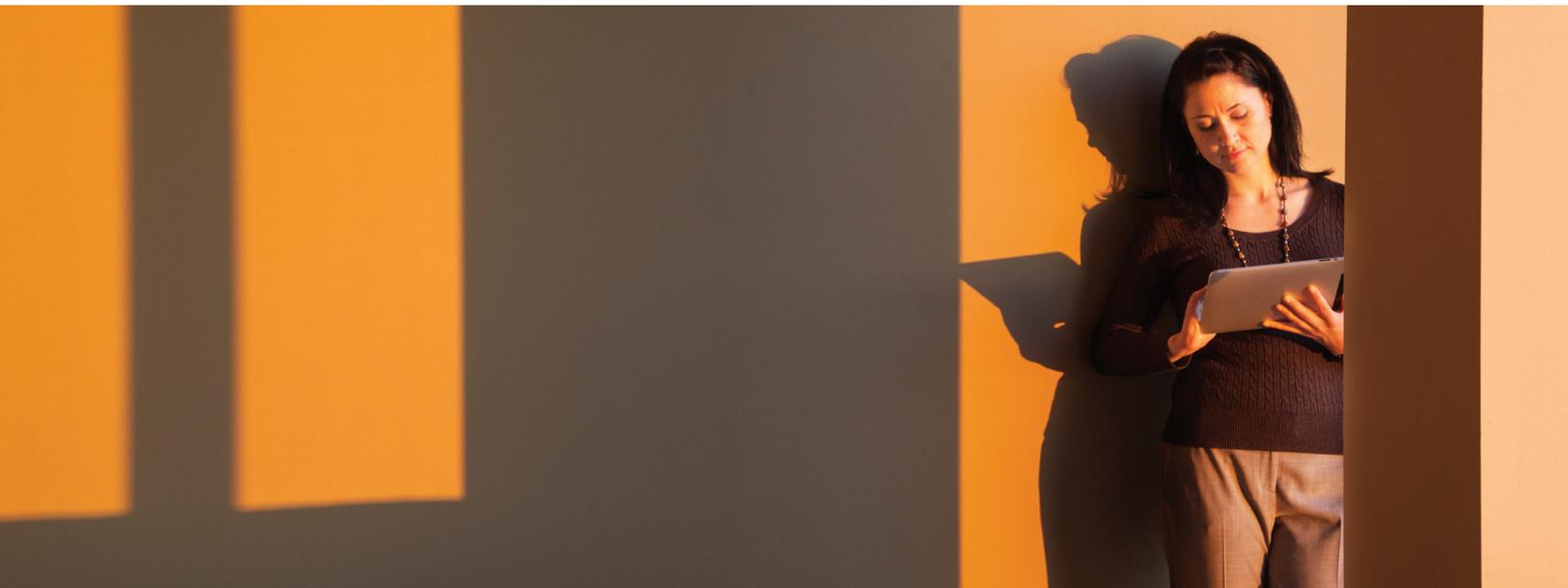
With CRM in the cloud, there's no costly upfront installation or hardware costs, and the pay-as-you-go model enables smaller, sleeker sales organizations to use only what they need. Your IT department doesn't have to install, maintain, or upgrade the application. All of that is handled remotely, freeing up your IT resources for more strategic (i.e., more interesting) projects.

5. Reliability

"Hope for the best and plan for the worst." It's a cliché if there ever was one, but it's also sound business advice. With CRM in the cloud, critical customer data is continually backed up and protected from any scenario that could threaten information stored onsite.

6. Compatibility

CRM in the cloud can be easily integrated with other key business applications and technology, enabling different departments to better collaborate, share information, and streamline workflows. Cloud-based CRM can also be integrated into communications systems, such as email or the business phone system. Phone service and **CRM integration** enable devices to automatically log calls and prompt users to update information about customer interactions.



CHAPTER 2:

Practical Examples of Cloud Application Integration

Enterprise application integration may not be the sexiest topic of discussion at your office's water cooler, but it's got a few tricks up its sleeve that might just surprise you.

It's increasingly becoming clear that organizations need to get smart about enterprise application integration. A recent **Enterprise Tech** article explains how companies have finally realized that IT isn't simply a tool to prop up business processes—it's a means through which those processes even exist. The result is the need to seamlessly embed IT into business processes.

In fact, *The 2018 State of Application Delivery report*, compiled by F5 Networks, backs this notion. In it, a clear theme emerged as respondents indicated a push to multi-cloud environments. In fact, almost half of those who took part in the survey reported that their digital transformation projects encouraged them to pursue new cloud application initiatives.

In theory, cloud integrations tie two or more otherwise distinct business processes together, but how does this work in a business day to day? Here are a few practical examples to show how the concept could apply to your own office:

- **Workflow:** Typical workflows, like onboarding, can be easily streamlined and automated. By integrating your cloud-based workflow platform with G Suite, you can arrange new events to automatically trigger calendar invites and send out associated documents.
- **CRM:** Customer relationship management or CRM software has a very meaningful impact on how businesses operate. So many companies use CRM, Salesforce, and SugarCRM. In these cases, users can click to dial straight from an entry, automatically log interactions, and even sync contact information straight from the phone system.
- **Industry Specific Tasks:** While the above examples could be found in just about any vertical, plenty of vendors have provided integrations for specific industries. Take recruitment, for example: Solutions exist to tie your phone system together with a platform like **JobDiva**® to make each interaction more effective and efficient. It'll automatically generate insightful reports on candidate interactions and quickly add new candidates straight from a call.

All of these examples involve the integration of enterprise data between systems, and organizations that get the most out of their cloud integrations understand this relationship well. First, identify applications that would benefit from shared information—you've probably got a few ideas brewing right now—then explore the providers that can tie them together for you.

Just keep in mind: Not all vendors are created equal. Though they might offer the same integrations, their functionality can widely vary within.

Don't settle for less—do your homework!

Integrating the Future

In general, the enterprise has up to this point mostly looked at cloud integrations as a way to bring legacy systems into a modern setting in a more efficient, manageable, and scalable manner. But there are bigger fish to fry.

Enterprises are finally starting to realize the fruits of their digital transformation initiatives. Naturally, this creates an environment of both curiosity and excitement for new optimization opportunities.

Don't believe it? The **2018 State of Application Delivery report**, compiled by F5 Networks, backs this notion. In it, a clear theme emerged as respondents indicated a push to multi-cloud environments. In fact, almost half of those who took part in the survey reported that their digital transformation projects encouraged them to pursue new cloud application initiatives.

Enter enterprise application integration. This practice will continue to see businesses leverage cloud integrations as an onboarding process for legacy systems, and the difference will be seen in how cloud integration providers innovate to meet the business needs of organizations looking for more than just digital transformation. As time goes on, don't be afraid to seek out these innovative integration opportunities to make your environment more effective and efficient.



CHAPTER 3:

CRM Integrations Drive Business Productivity and Elevate Service Delivery

Surely, we've all been through the painful experience of a long, drawn-out call to a customer service center. The challenge usually begins by navigating multiple menus until you reach an actual human being who can help. Then, when you do get a real person, there's a good chance they won't recognize who you are or understand your request or issue. Even if they do, it can take forever because they have to put you on hold while they switch screens or systems, pull up your account, or transfer you to multiple departments. Simply put, it's not pleasant. Fortunately, businesses today are improving the customer service experience with CRM integrations that tie cloud business phone service with critical CRM systems. The increased use of CRM integrations aligns well with a cloud application marketplace that's expected to generate nearly \$76 billion in subscription revenues by 2020, as reported by Apps Run the World. By breaking down the system silos of yesteryear, and giving customers and service representatives the data and tools they need to make those excruciating calls go more smoothly, businesses can gain and retain more customers, improve business processes, lower the bottom line, and ultimately stay ahead of the competition.

In today's hyper-connected world, it's imperative that systems can "talk" to each other in order to provide the kind of efficient service that customers expect. CRM integrations that marry the business phone system with cloud CRM tools through the use of APIs can do just that—and drive customer satisfaction along the way. Top cloud CRM integrations typically include these capabilities:

- **"Screen pops"** instantly display customer account details for incoming and outbound calls, so representatives can identify the caller by name and even have insight into past interactions and preferences
- **One-click dialing** to any customer directly from the CRM database, and through a web browser, saves time and money and increases response rates
- **Dynamic call routing** can identify the right representative who can resolve issues and escalate calls on-demand
- **Automatic call logging** from any device allows real-time reporting and auditing of response rates and level of interaction
- **Attaching relevant records to call logs**, recording information about the details and nature of the call for future reference, and prioritizing incidents

Leading cloud phone providers offer a growing selection of cloud integrations with top industry CRMs such as **Salesforce®**, **Microsoft® Dynamics**, **NetSuite®**, **Bullhorn®** and **Zoho® CRM**. Some also provide cloud integrations with employee productivity tools like **G Suite™**, customer service tools like **Zendesk®**, and business management tools like **ConnectWise®**.

Customers are now more demanding than ever and expect personalized, efficient service. By giving your representatives the tools to streamline interactions, you can meet those demands while increasing employee productivity, saving time on each call, and improving the overall quality of interactions. Simply put, your service team should no longer be left to fumble through disparate systems to hunt down bits and pieces of information, as they attempt to maintain a level of service continuity. CRM integrations provide a better way.

Every business today is keenly aware it must make customer service a priority, which is why it's no surprise cloud contact centers are seeing increased adoption. If your company is looking to provide a higher quality of customer service, operate more efficiently, capitalize on business software integration, and build flexibility for the future, a cloud-based solution for the contact center provides an excellent way to achieve all these goals.

CHAPTER 4:

Cloud Integrations Can Help You Earn Customer Loyalty

The secret to a successful business is pretty simple: have loyal, long-term customers. And if you aren't using cloud CRM technology, it's likely you are losing potential long-term customers. **Harvard Business Review** found that landing a new customer can be 5 to 25 times more expensive than keeping an existing one. It's easy (and enticing) to focus on new customers, because it's such a great feeling to land a new account. However, it's essential to maintain strong relationships and provide excellent service to current customers to build their loyalty.

Technology makes it much less time-consuming to keep your customers happy. The secret is knowing what they want and then automating the process of giving it to them. **Cloud-based CRM** technology can be integrated into other communication tools your business uses (like your phone system), allowing you to predict and deliver targeted, holistic marketing strategies for clients and prospects alike.

Find Out What Your Customers Want

You probably think you know what your customers want as a whole, but the trick is finding out what each and every customer cares about. Before you start going through your customer database and frantically trying to figure out the puzzle, stop. Breathe. You already have your answer in your CRM software—how they shop, what they buy, when they shop, and which discounts or coupons they use.

By using a cloud-based CRM tool, you now have real-time information updated automatically from all sources, such as salespeople, your customer portal, customer care associates, and in-store employees. Your team can use CRM technology to log notes directly into the system during the interaction as well. And, your employees can access it from any device and location.

By **integrating with your phone system**, you can also reduce the time it takes to contact your customers by using click-to-dial and automating call logging.

Give Your Customers What They Want

Getting the information is the easy part, but taking it to the next level is where you turn casual customers into lifelong fans. Because you'll have each customer's data easily accessible, you can take what you know and create customized, delightful experiences.

For instance, say a customer at your spa always gets a 60-minute massage once a month on Friday and will occasionally treat herself to a pedicure. You also know she always books her appointments using a mobile app and has never once logged onto your website. Instead of giving her a discount on a facial or a service she has never shown interest in, you give her a discount for a combination pedicure and massage for next month through a mobile app notification. Even better, if you notice she misses a month, you can use that information to flag an associate to give her a call to check on her and offer to set up an appointment.

And when she calls to cancel last minute? You know it's her calling, because your phone system recognizes her number, as it's integrated with your CRM. You know her appointment is today at 2, and you're happy to let her know that her preferred manicurist is free next week at her regular time.

It's easy to think that technology makes customer relationships less personal, but if you use the tech-generated information to meet and exceed the expectations your customers don't even realize they have, the result is a personal relationship between the customer and your company.

CHAPTER 5:

Salesforce Cloud Integration Gets You More Bang for Your CRM Buck

If you've ever bought a new car, you likely remember how carefully you considered every feature. After all, it's a big investment that you'll probably keep for years. So, why not consider the smart options that can deliver the best possible driving experience? CRM is also a big investment. Your team will use it for years, and you certainly want to get the most out of it. To that end, today's businesses are actively enhancing CRM productivity by employing **cloud integrations**.

Benefits of Salesforce Cloud Integration

Cloud integrations offered by business phone service providers are particularly notable in their ability to drive productivity, capture intelligence, and improve customer service interactions. Here's what makes **Salesforce integration**, which ties business phone service together with the Salesforce CRM account, a real game changer.

Greater Sales Rep Productivity

Time really is money for salespeople. Whether they're warming up new leads, moving prospects through the pipeline, or nurturing their networks for future business and referrals, salespeople spend a lot of time on the phone, and a lot of time in the CRM platform.

When CRM and business phones are integrated, sales teams don't have to switch from one tool to another. They can click to dial straight from the CRM. That call gets automatically tagged and logged in the customer's profile, along with any notes the sales rep took during the call.

Since **CRM in the cloud** works from any internet-connected device, reps can access data whether they're in the office, working from home, or out visiting clients. And thanks to automatic call logging, important details always make it back into the CRM. This frees salespeople from the administrative tasks that many would have conveniently "forgotten" anyway, and gives them more time to do what they do best: close deals.

More Relevant Marketing

In the digital age, buyers have become professional inbox scanners. They read subject lines with one finger hovered over the delete button. Irrelevant marketing messages get trashed immediately.

With cloud CRM integrations, better record keeping from sales teams means marketing can easily see where prospects are in the sales cycle, what challenges they're facing, and what information would be most engaging at that point in the decision-making process. Then they can send relevant content and help nurture those leads. Better yet, when their marketing automation platforms and CRM are also integrated, relevant content is automatically triggered.

Improved Customer Service and Tech Support

The only thing worse than being told to "please hold" for the third time in a row is being asked who you are and why you're calling for the third time in a row. The more complicated your problem, the more your blood pressure goes up each time you have to explain it.

With phone service/CRM integration, inbound screen pop-ups provide team members with all the information they need to identify and help callers—including customer profiles, records of previous calls, and any notes that were captured during escalation. This way, callers get a seamless customer service experience, no blood pressure medication required. Your company is heavily invested in its CRM. Cloud integrations help you maximize the value from this investment.

CHAPTER 6:

Microsoft CRM Integration: Getting the Most Out of Your Cloud Investments

With everything from hardware to middleware moving to the cloud, integrating new services and solutions has become par for the IT professional course. With that said, how do you know you're getting the most bang for your buck when choosing a new Microsoft CRM integration?

Identifying Opportunities

You've been on the Microsoft Dynamics train for a while now and are pleased as punch with the management tools it places at your disposal. Life is coming up roses as your department notices newfound efficiencies for handling customer data and using enterprise resources. The thing is, there's still a tiny little voice in the back of your head telling you, "There must be more."

In order to find this opportunity, the best place to start is to simply look at the core business function of the cloud service upon which you're looking to expand. In the case of Microsoft Dynamics, that would be communication. With CRM platforms hinging upon data that empowers communication, it only makes sense to look at integration opportunities in similar solutions.

For example, perhaps your Microsoft Dynamics deployment is primarily used in your call centers. In all likelihood, users are pulling information out of and adding data back into Dynamics with each call they take. This is an obvious opportunity for cloud integration.

Shopping Around for a Microsoft CRM Integration

Expanding on this idea a bit, the logical connection point is within the phone system itself. What if you could pipe calls directly through Microsoft Dynamics to automatically pull up useful customer information? In doing so, you've already eliminated a few steps from the typical call process and introduced a subtly powerful way to connect your cloud infrastructure.

Don't sell yourself short here, either. While **integrating Microsoft Dynamics** with your cloud-based phone system is a great way to collect that low-hanging fruit, be sure to do your homework. Which phone system integrates best with your existing infrastructure? Which one offers the most opportunities for improvement with Microsoft Dynamics?

While you'd be hard-pressed to find a cloud-based phone system that didn't offer some kind of opportunity to enhance customer relationships, not all are created equal. For example, by shopping around, you may stumble upon solutions that offer automatic screen pop-ups with integrated Microsoft Dynamics customer information on inbound and outbound calls. That means no more pressure to come up with witty banter as you desperately search for customer information on the fly.

Other potential enhancements include call recording and note-taking integration. With this functionality, you can tag, record, and annotate calls in real time with all resulting information stored directly in Microsoft Dynamics. Features such as single click-to-dial are also worth shopping around for, as they introduce even more ways to cut out wasted time.

While deploying a Microsoft CRM integration with your cloud-based phone system is a great example of the potential of **cloud integrations**, the principle applies just about everywhere. The next time you find yourself content with one aspect of your organization's cloud infrastructure, it's time to look for ways integration can drive innovation and success.

CHAPTER 7:

Zoho Cloud Integration: Streamlining Operations and Customer Interactions

Given the massive volumes of consumer and transaction data required to meet user expectations and inform long-term sales strategies, CRM tools are now commonplace for enterprises. As a result, integration with best-of-breed software-as-a-service (SaaS) solutions to empower CRM functionality and performance is on the rise, and that's why **Zoho CRM integration** is a featured toolset.

Improving CRM with Zoho CRM Integration

Zoho is one of the most popular cloud software suites on the market, and with good reason. **PCMag** calls Zoho Projects "the best project management (PM) tool on the market," and the company's new Zoho Sprints offering leverages the Agile Manifesto to empower smaller-scale and more flexible projects. It's no surprise, then, that a dedicated community has sprung up around Zoho. Known as "**Zoholics**," they champion the many uses of this tool, hold multiple conferences each year to help improve the offering, and discover new ways to use Zoho SaaS.

The Zoho integration aims to empower enterprises to link familiar Zoho features with their existing phone system and get ahead of the competition. And Zoho CRM integration includes the features customers have come to expect from CRM including:

- **Call Logging:** Who's calling, when, and for how long? Recording this information and integrating it with existing CRM tools gives companies the deep data pool they need to improve overall customer service
- **Note-Taking:** Agents often discover critical information while on calls with consumers. Integrated note-taking makes it easy to create reports, sort through conversations, and prioritize calls for escalation or remediation
- **Screen Pops:** One source of frustration for agents and callers is the dreaded "switch pause," which forces agents to put callers on hold while they switch programs or platforms. Zoho integration provides both inbound and outbound pop-ups with caller information along with any existing Zoho records, and the ability to quickly add another task or appointment
- **Quick-Add Contacts:** Adding or modifying contact data can be time-consuming and confusing for agents, especially if they're still on the line with customers. Quick-add contacts simplify and streamline this process
- **Call Time Reporting:** Time spent on calls can help inform future contact center best practices. Automatic call time reporting provides critical detail about call times and duration to help analyze potential prospects and improve call efficiency
- **No Client-Side Install Required:** Since no software is installed client-side, CRM integration is available across mobile and desktop devices, in turn providing a unified, lightweight experience

Since no software is installed, CRM integration is available across mobile and desktop devices, providing a unified, lightweight experience.

Integration in Action

Lists of benefits are one thing, but how do these features really impact the enterprise bottom line? Consider the case of Rocky Ridge Trucks, a specialty vehicle manufacturer based out of Franklin Springs, Georgia.

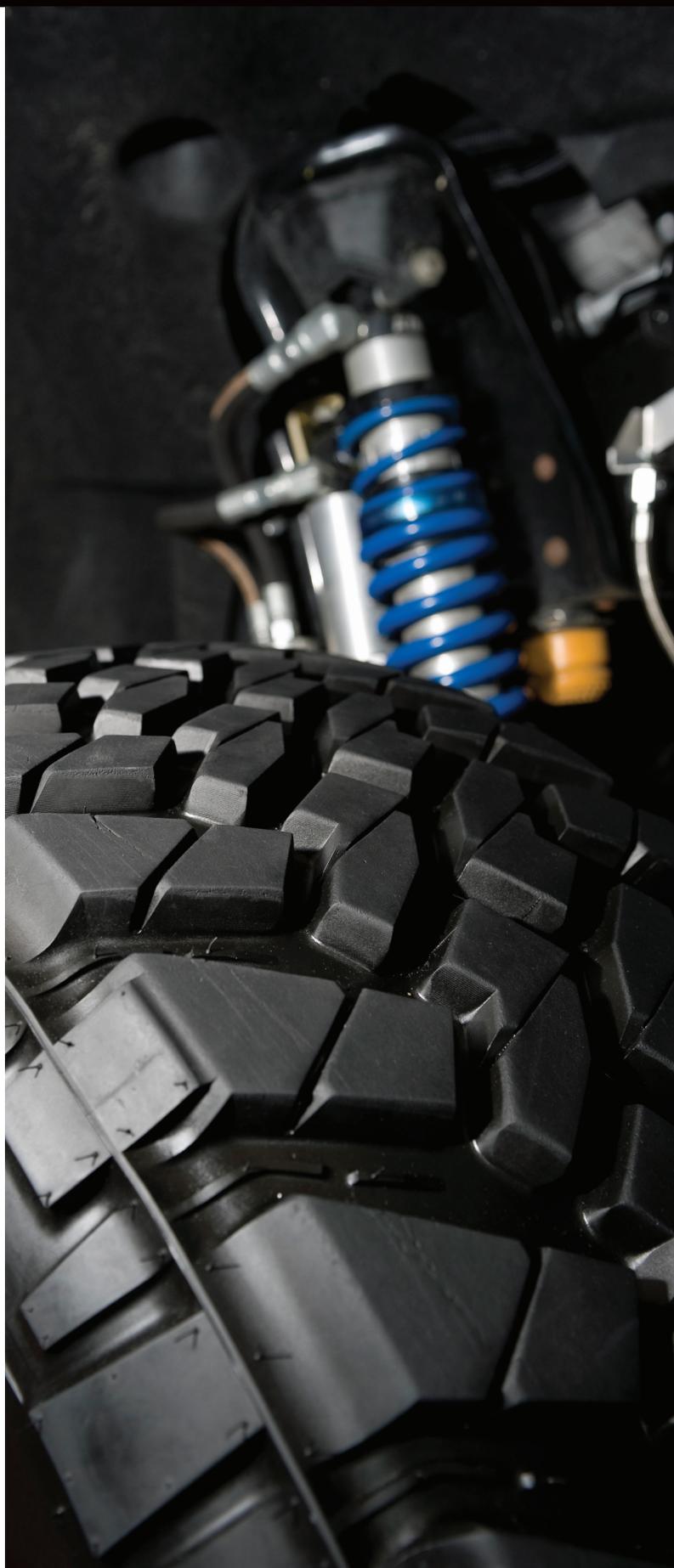
The company's 15 sales reps are constantly reaching out to new car dealerships across the country in search of partnerships as official Rocky Ridge Authorized Dealers. This is challenging work, especially considering the tough-sell nature of many dealership personnel and the large number of accounts managed by each Rocky Ridge sales representative.

The company turned to Zoho integration, and Inside Sales Manager Billy Reagin says, "We're now to the point where we're gathering enough data on who we're contacting, and when, that we'll soon be able to restructure our days to improve our targeting and increase our close rate."

So what's the takeaway for enterprises leveraging CRM tools but not seeing the returns they expect? First is the need for innovative CRM integration, which empowers basic services to improve overall sales and retention rates. It's also worth considering the specific value of Zoho tools and CRM integration: By pairing current systems with features such as automatic call logging, note-taking, and call time reporting, it's possible for companies to reduce customer frustration, improve agent efficacy, and boost the bottom line.

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– Billy Reagin, Rocky Ridge Trucks



CHAPTER 8:

How Does Oracle Cloud CRM Integration Improve Client Interactions?

An Oracle cloud integration gives your team greater freedom to field customer calls with more context, wherever they are. When you begin integrating cloud communications with a CRM like Oracle Sales Cloud, the first benefit you'll likely notice is streamlined call management. While it's easy to overlook, the actual communication piece of the sales puzzle—meaning calls, video conferences, or instant messages—requires its own fair share of management.

Think busy-work like tracking missed calls, documenting notes for each interaction, and even simple tasks like syncing new contact information. It may seem trivial at first blush, but inefficiencies here not only waste time, but ultimately lead to less effective communication. When your client interactions lose traction in this way, sales opportunities are sure to follow suit.

When you've got an entire CRM of information about a customer right at your fingertips for each call, you'll find yourself empowered to ask or answer the right questions at the right time.

This is what makes CRM/phone system integrations worth it: making meaningful customer communication effortless. Click to dial the customer straight from your Oracle Sales Cloud dashboard; eliminate lost information with integrated note taking while on the call; automatically sync contact information between all your devices; make following up easy with missed-call pop-ups and highly visible call logs.

Marrying two interdependent technologies ultimately underscores the best integrations. Cloud-based communication and Oracle's CRM simply serve as a great example. That said, simplifying communication management may sound like a great idea, but what can it do for your bottom line?

Oracle Cloud Integration: More than the Sum of Its Parts

There are two ways Oracle cloud integration can pad your bottom line: cost savings and revenue generation. When it comes to cost savings, you'll likely find it manifesting in more effective use of time.

When you think about it, time is the one commodity that everyone shares equally. No matter who you are, you've got the exact same amount as the person next to you; 24 hours each day is all you have. It's what you do with it that sets you and your organization apart, especially in the eyes of the customers.

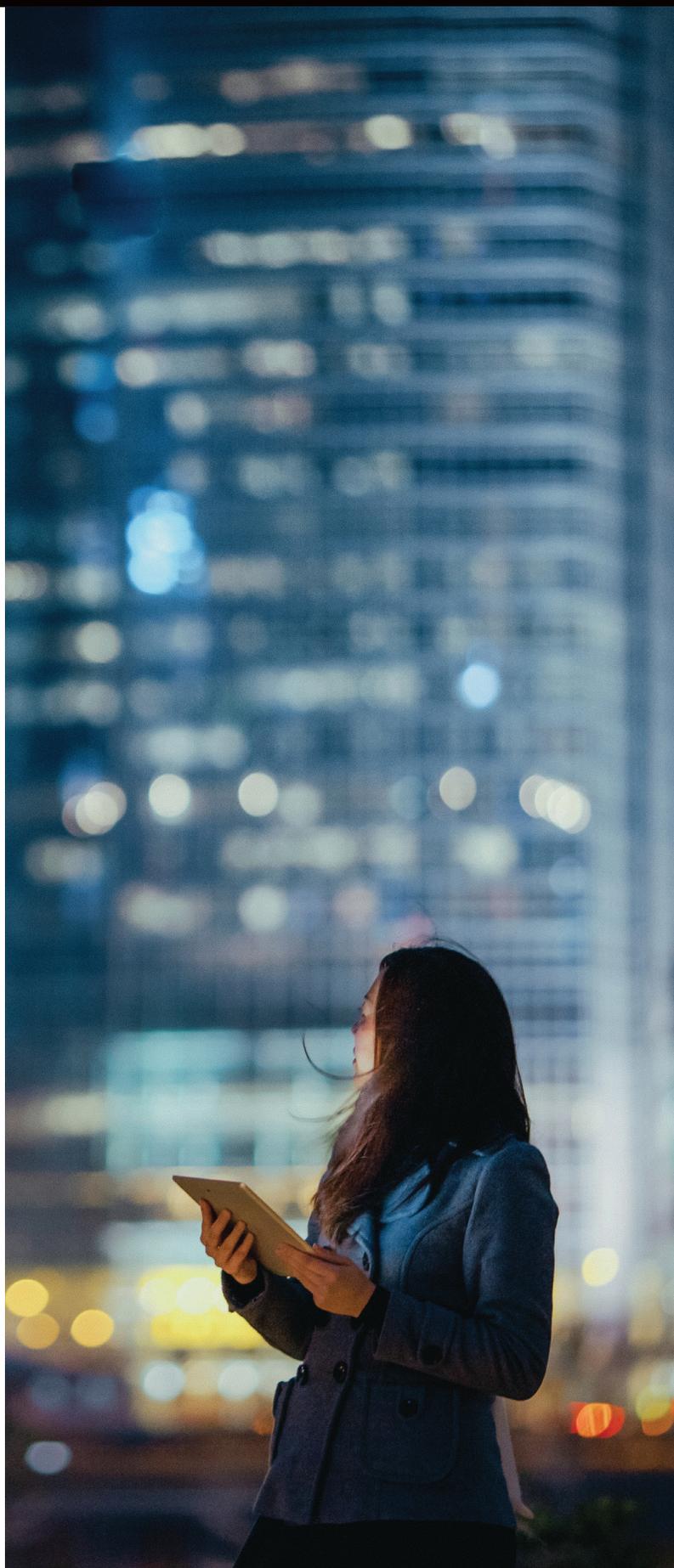
For example, if you're able to field sales calls on your mobile device with the same CRM support you'd get at your desk, you'll find yourself more productive in more places. Having CRM info such as sales notes, important dates, and contact names pop up automatically with incoming calls on your mobile phone can save you a surprising amount of time.

Your newfound mobility will save you trips to the desk, office, and conference room, trimming even more time in the process. If time is money, you'll be saving plenty of it with an integration of your phone system and CRM.

As for revenue generation, the driving force here is increased productivity and customer satisfaction. As described above, integrating cloud-based phone systems with your Oracle CRM grants employees the increased mobility and flexibility necessary to be productive anywhere in the world, and it also makes each client interaction more meaningful.

When you've got an entire CRM of information about a customer right at your fingertips for each call—or text, instant message, or video conference—you'll find yourself empowered to ask or answer the right questions at the right time. Oracle's unique insight will be effortlessly handed off when using your phone system, preparing you for every customer interaction that comes your way.

In other words, your newfound productivity will lead to more satisfying interactions—and a satisfied customer is a happy customer. And, as we all know, happy customers mean revenue.



CHAPTER 9:

NetSuite Integration: Do More with Your Precious Time

How can a business do more with less? This question may be answered by **NetSuite integration**. Oracle's cloud answer to the more-with-less dilemma rolls common IT services like ERP, CRM, and professional services into a single cloud appliance from a single vendor. Here's how to fold communication into the mix, building a less-is-more foundation that empowers your organization's revenue-building capabilities.

Streamlining Connections: You Have the Power

Staying connected with customers is obviously a priority, but it's not always easy. With NetSuite integration, you can access critical customer information anywhere in the world and from just about any electronic device in your pocket. Leverage the power of NetSuite CRM while waiting for a flight, a taxi, or a cup of coffee.

Empowering Insights Through NetSuite Integration

It would be an understatement to say that NetSuite offers a bounty of customer insights. From automated reports to cutting-edge dashboards, you always have the best view of your customer data. But what about data like call records, notes, and contact information?

While it may not seem like critical data in the moment, it's never fun to be on a customer call, struggling to remember the details of what was discussed previously. This technology is capable of bringing surprisingly powerful new insights.

- Automatically capture all call logs, whether the communication took place a few minutes prior or last year
- Track call activity and history while adding searchable notes—such as those all-important meeting minutes—to each interaction

In other words, take comfort in knowing that your data will always be there to back up every customer relationship. When it's all said and done, any integration has a single test to pass if it's ever going to pay off: Does it drive better business outcomes?

The Easy Way to Simplify

There's something to be said for accessibility. Whether it's finding a front-row parking spot or choosing the shortest line at the grocery checkout, easier and faster is the goal. You're not being lazy; you're being efficient.

That's exactly what this technology brings to the table. Seamless management of those ever-changing contacts in any number of business applications from a single view. Click-to-dial straight from your NetSuite dashboard. Even simple NetSuite customer lookups get an efficiency makeover as incoming calls are handed off to NetSuite to bring more informative data to your notifications.

Don't Sweat the Tech Stuff

Integrations are great and all, but they can be downright painful to deploy. Visions of massive hardware refreshes, driver updates, and overflowing ticket systems immediately come to mind. This is mercifully inapplicable to NetSuite. Again, thanks to the magic of the cloud and **VoIP technology**, these solutions live right in your browser and function effortlessly on a smartphone, tablet, or desktop.

Positively Productive

Productivity is simply an equation of work over time. The more work you accomplish over a set duration, the more productive you are. To increase productivity, you can either do more with the time you have or give yourself more time in which to do it. NetSuite integration tackles the issue from both ends.

By making it easier to access critical information during each customer interaction, your time becomes more effective. That's to say nothing of added automation for things like call logging, note taking, and contact management. Additionally, by being available on any device at any time from anywhere in the world, you'll be able to be productive at a moment's notice.

When it's all said and done, any integration has a single test to pass if it's ever going to pay off: Does it drive better business outcomes? In the case of NetSuite, that mostly boils down to customer interactions. These days, if those interactions aren't immediately engaging and personalized, you've already missed the mark.

This is where this integration really shines. How do you personalize customer interactions? By getting to know your customers. How do you better engage your customers? Your NetSuite platform has you covered there, helping you meet them where they are, be it by text, instant message, voice, or video.

Bring the two together and—well, you get the point: Personal, engaging, and ultimately more effective interactions, all in a more productive and efficient way.



CHAPTER 10:

Legal Integration: The Clio Cloud and Other 'As-a-Service' Solutions

Law is going to the clouds. While some firms don't see software-as-a-service (SaaS) solutions passing the bar anytime soon, Big Law Business notes that entirely cloud-based firms are now emerging. Some organizations don't rent offices or set specific billing rates—instead, they let attorneys work how they want, where they want.

Most practices aren't prepared to move operations entirely offsite, but that doesn't mean moving to the cloud is a lost cause. From case management solutions such as Clio cloud to electronic signatures and document management, it's possible for firms to make solid arguments for the cloud and return a verdict of solid ROI.

The Case for the Cloud

What's the current state of legal cloud solutions? As noted by the **American Bar Association** (ABA), cloud solutions offer marked benefits over traditional legal software, including greater functionality and usability, improved service and support, and increased availability and access. The ABA points out that many lawyers spend time away from critical case and client tasks dealing with technology issues. The cloud offers a way to put their focus back where it belongs.

However, are firms able to meet ethical guidelines in the cloud? According to **Above The Law**, 19 states have issued ethics opinions on attorneys using the cloud. None have flat-out said they can't, and around half said they could—with stipulations.

For example, Ohio guidance suggests that law firms should take the following steps when using the cloud:

- **Consider Vendor Qualifications and Reputation:** The state offers general guidelines on service agreements, but nothing specific. Firms must use their best judgment here
- **Ensure Confidentiality:** Firms should ask vendors about data protection and make sure systems back up claims
- **Supervise Cloud Vendors:** No time frame or frequency of supervision is given, but the state recommends checking in with vendors
- **Communicate With Clients:** Tell clients their documents are in the cloud if it's relevant. Otherwise, there's no need for the conversation

Many lawyers spend time away from critical case and client tasks dealing with technology issues. The cloud offers a way to put their focus back where it belongs.

A Firm Foundation

It's worth taking a look at some of the most popular **cloud-based business tools** for the legal sector and how they can integrate with your day-to-day practice. The **ABA** points to several solutions, including the following:

- **Clio:** This **case management tool** lets you see upcoming caseloads at a glance, monitor their billing targets, link tasks, bill directly, and easily run reports to obtain actionable data. The Clio cloud also lets firms share documents and bill clients online
- **Chrometa:** This application automatically captures and categorizes attorney time, taking the burden off lawyers to record, classify, and then review time spent on various aspects of their caseload
- **DocuSign:** It's now possible to securely send and sign documents over the cloud. DocuSign lets lawyers and clients sign documents on mobile devices and collaborate with third parties
- **DirectLaw:** This service lets clients and attorneys connect and collaborate in the cloud, helping reduce scheduling conflicts that stem from face-to-face meetings

Expanding Impact

SaaS options offer a great starting point, but how do firms expand their impact? Consider the Clio cloud. While the tool helps track billable hours and tasks, firms using traditional communication systems may still struggle with billable phone records, since this integration doesn't naturally occur. But by employing a **Clio integration**—tying cloud phone service together with Clio—organizations can automatically track time stamps, access call logs, and ensure all calls include tags and relevant notes.

Legal organizations can also take things a step further by combining their full suite of unified communications-as-a-service (UCaaS) tools with the Clio solution. For firms such as **Meikle West**, this integration allows attorneys to work where they want, when they want, and how they want while still supporting the corporate business model. By tracking time spent on phone calls, video conferences, emails, and even instant messaging, Meikle West enjoys a 10 percent boost to time capture and billable hours, while time-stamping ensured the company's system is ready for any potential audits.

There's a case to be made for moving to the cloud. While most firms don't want to abandon the tried-and-true model of traditional, personal law practice, it's now possible to get the best of both worlds—associates and attorneys working where it best suits them, connected by flexible cloud services that empower time tracking, collaboration, and billable hour collection.



CHAPTER 11:

Business Management Cloud Integrations: ConnectWise, IT Business Management's Secret Weapon

IT has become such an integral part of modern business that, in many cases, companies can directly tie it to overall success. Manage your infrastructure well, and your business processes will flourish. Conversely, poor IT management can quickly kill any business mojo you've got going.

Using ConnectWise Cloud Integration to Automate Menial Tasks Can Save IT Productivity

With that in mind, ConnectWise cloud can ease the management aspects of modern IT. From seamless cloud monitoring and management to automated cloud billing, this technology makes it easier to operate a successful cloud in an age where managerial tasks can quickly overwhelm the most unflappable employee.

As great as these features are, they only make up part of the IT puzzle. After all, you wouldn't be here if you weren't out to squeeze every last bit of performance and efficiency from your environment. As with many things in life, the ConnectWise cloud is actually at its best when it's part of a team. As it relates to IT, this means integrating with other aspects of your environment. Read on to learn how the combination of **ConnectWise** and your communications platform can create tangible efficiency gains and cost savings.

What Can ConnectWise Cloud Integration Do for You?

Admittedly, IT integrations tend to strike fear into the hearts of IT professionals. However, this integration of two cloud technologies makes all the difference. Instead of worrying about compatibility lists and scheduled downtime, integrating ConnectWise and your **cloud communications platform** is a plug-and-play affair.

Why would you want to attempt this integration in the first place? You're looking for ways to make your life easier and more productive, right? If so, you're in luck, because that's exactly what this kind of integration offers—in addition to providing some extra savings.

Think about it this way: ConnectWise helps automate IT management. Well, what's management without communication? By tightly integrating both worlds, your job gets easier. For example, you may already be using ConnectWise to manage IT tickets and support. As such, you already know ConnectWise provides a bounty of tools to make this process highly visible and efficient. What happens, however, when you need to communicate with a user, customer, or vendor on a specific ticket?

Like most, you probably search for contact information, make a call, and find yourself with a pile of information to somehow incorporate into the ticket. With cloud-based phone system integration, this becomes a much more streamlined task.

Instead of the above scenario, you could click to dial the vendor straight from your ticket while leveraging integrated, automatic call logging and note syncing to take the legwork out of compiling information. All this leads to less time spent on trivial tasks and more time being productive.

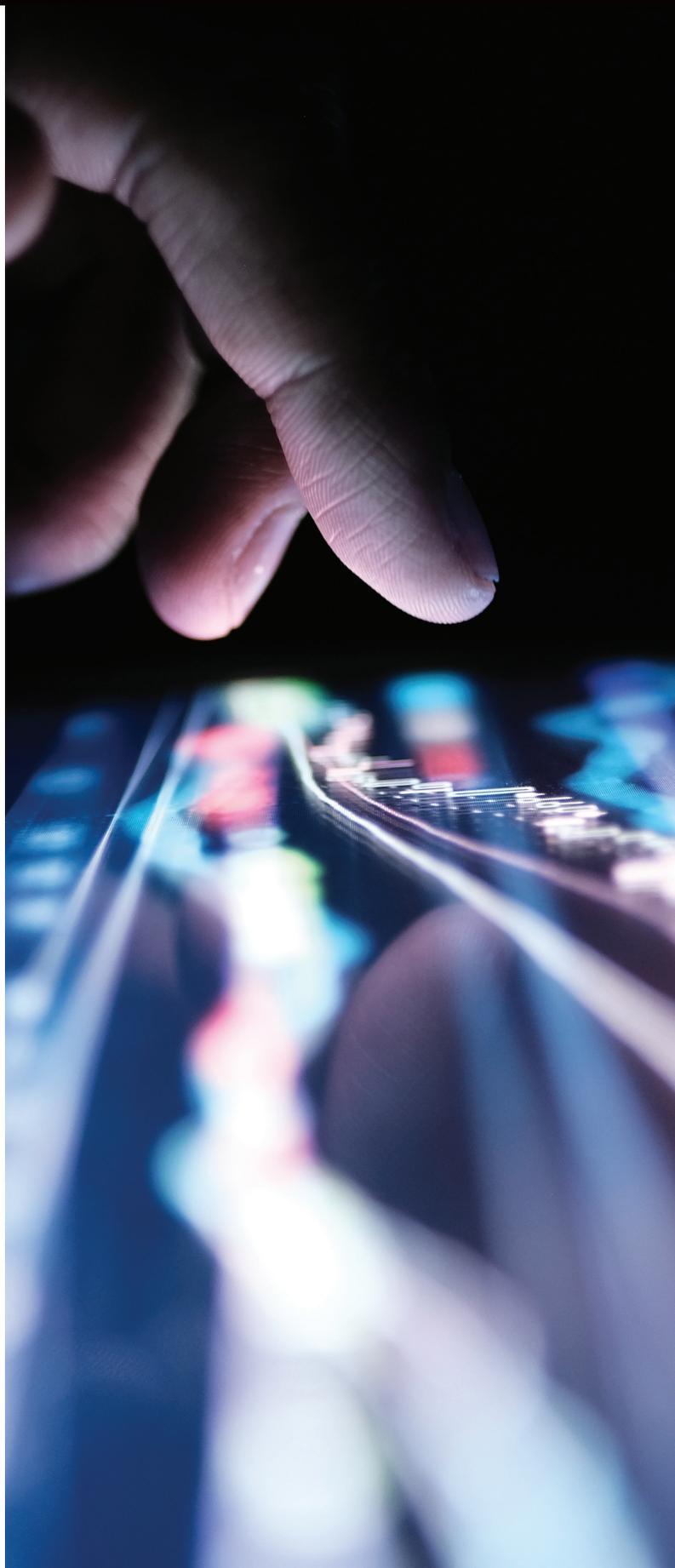
Driving Savings and Success

So, ConnectWise integration with a cloud-based communication platform can improve efficiency. What exactly does that mean for you? Well, to throw some cold, hard numbers at you, **KPMG** reports intelligent automation could produce anywhere from 40 to 75 percent cost savings. Has that piqued your interest?

In reality, ConnectWise and communication integration go far beyond the financial figures businesses tend to put on a pedestal. When you consider the notion that IT business management is as much an art as it is a science—as **CIO** so eloquently puts it—you begin to realize the greater operational benefits such an integration offers.

But the success of IT business management can be surprisingly subjective. From your colleagues to your clients, success is judged by user satisfaction as much as any finance report. This satisfaction depends heavily on your ability to facilitate business processes in an effective and dependable manner. Wasting time on menial tasks such as contact lookup, ticket updating, and all those other loose ends of IT management and communication isn't helping your cause. It's for this reason—in addition to the potential cost savings—that integration is so critical.

When all's said and done, an investment in integrating your business management application and your communication platform is an investment in IT success. Streamlining admin control, data capture, and caller interactions all lead to tangible cost and time savings, which in turn free you up to focus on user satisfaction.



CHAPTER 12:

Customer Service Integration: The Benefits of Zendesk Integration for Productivity, Profitability, and More

When it comes to cloud integrations, it's a good idea to focus on those that impact critical business processes—particularly if you're interested in getting the most for your money. And what's more important to your organization than your customer interactions?

When you need to talk with the customer, you pick up the phone. But before that, you probably take a quick peek at your customer relationship management (CRM) platform to make sure you're prepared for the conversation. A **Zendesk integration** with your cloud-based phone system can make these all-important interactions more efficient and profitable. Here's how:

Improved Productivity: The End of the Digital Manilla Folder

CRMs are the digital manifestation of the tried-and-true manilla folder method: cram every relevant—and maybe irrelevant—bit of customer information into a couple pages and stuff it away in a dingy filing cabinet. Fortunately, technology has come a long way. Now you can pull up that same information with a couple keystrokes instead of a trip to the archives. But there's still a gap between this information and the actual customer interaction.

Juggling the navigation of your CRM while dialing a customer and recording notes can make the whole process seem more like a circus act than a meaningful conversation. A Zendesk integration can make this everyday business process easier.

To that end, the ties that bind your Zendesk CRM and cloud-based phone system come in many forms:

- **Call Screen Pop-ups:** Inbound and outbound calls trigger on-screen notifications that let you know who's calling and why
- **Automated Call Logging:** Calls that are matched to a Zendesk contact are logged automatically
- **Contact Sync:** Anytime you're interacting with customers from your desk or mobile phone, new contact information is synced with Zendesk
- **Call Reporting:** Access real-time call statistics with integrated Zendesk notes that can be quickly reviewed or exported for future perusal

With the smooth integration of your Zendesk CRM and cloud-based phone system, you'll find a new depth of automation.

The Contact Center: Where Profitability Counts

Of course, cloud integrations just aren't worth it if they don't impact your bottom line. After integrating Zendesk, your operation will begin running more efficiently, lightening your workload and driving down costs: Efficiency and cost are indivisibly tied together. After all, time is money.

With the smooth integration of your Zendesk CRM and cloud-based phone system, you'll find a new depth of automation. Gone are the days of time wasted copying notes and contact information and figuring out how to better communicate valuable insight to your customers. This is all thanks to the simple concept behind the integration: Take the small, mundane aspects of customer communication and automate them. Call logging, note taking, contact syncing, and even the act of dialing a customer are all streamlined to shave time off each interaction, improving both workflow and efficiency.

For contact center and CRM professionals, the benefits of a Zendesk integration will likely be seamless, while managers will be thrilled to have new features—such as the ability to effortlessly manage customer information. From contact creation to scaling out for new users, integration turns a lengthy process into a seamless, one-stop solution.

New contact centers can be brought online with voice, chat, and video from the comfort of your desk, and connecting critical information to these communication channels is similarly effortless. With this integration, the powerful information stored within your CRM will already be connected when your call center goes live.

The Benefits of Zendesk Integration

Fair or not, the success of an integration is often judged through the lens of mobility, productivity, and profitability. Integrating Zendesk with your cloud-based phone system provides you with:

- The ability to access the wealth of knowledge stored in your CRM while on a call in your office, on a plane, or out in the field
- Newfound productivity, as workflows that were once bogged down by mundane administrative tasks like compiling call notes become streamlined and automated
- ROI, as each customer interaction is made more meaningful thanks to increased visibility and availability of impactful CRM data

At the end of the day, integrating Zendesk with your phone system makes your life easier. It just so happens that it makes meaningful customer interactions easier, too.



Get Started Today

Do you have the kind of cohesive cloud integrations strategy that will keep your business ahead of the competition?

From legacy software to the business applications you use every day, your organization deserves the innovative integration opportunities to make your business environment more effective and efficient and your overall enterprise more productive. While each category of integration serves its own individual purpose, it needs to function with the big picture of your employees' business day. The beauty of an integrated communications system is that you don't have to choose. You can easily add in more than one pre-built cloud integration. Ready to take a step into a more efficient future? Contact a Vonage cloud integrations specialist today.

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GET STARTED