

Checklist:



GENESYS™

Beyond basic integration: Unify your CRM system and contact center

Simplify your tech, synchronize your data and reach a new level of CX personalization

To deliver on a customer-centric strategy, your CRM system and contact center capabilities must work together. Both agents and automated service options need quick access to data from both systems – customer demographics, purchases, conversation history, preferences and more. And together, your solutions must be able to orchestrate consistent, personalized customer journeys across channels.

Keeping your systems integrated is a high priority for your IT team. But with a typical integration, data doesn't always sync. New capabilities from one system don't always work with the other. And with every system update, your team springs into action to ensure nothing breaks. That drains your technical resources and can leave customer experience (CX) teams stranded without the information and tools they need.

It's time to move beyond basic integration toward a unified solution in which your CRM and CX platform are designed and built to work together from the start. A unified solution simplifies your tech stack, reduces IT burdens and generates new possibilities for your CX strategy.



To realize the value of a unified CX and CRM solution, be sure it equips you to deliver on these key CX strategies.



Strategy 1: Orchestrate more personalized experiences and build loyalty with every customer

To personalize experiences, you must know your customers. That means connecting data across the full customer journey — and across systems — is critical. With a holistic view, you can leverage artificial intelligence (AI) to anticipate and automate tailored experiences. Here's what you'll need.

□ Synchronized, AI-ready data

Pre-integration and a shared schema between your CRM system and CX platform will keep your data synchronized and flowing without additional development burdens. You can use the connected data to deepen personalization and build customer loyalty. And if the data is already AI-ready, you can launch smarter automation, expand self-service options and enable a wide range of AI capabilities — fast.

□ A single CX orchestration engine

With a native integration, you can strategically combine data and capabilities from both your CX platform and CRM system to orchestrate AI-powered experiences that span the customer journey from end to end. Blend data, bots and channels to create your own custom CX solution — from a single omnichannel routing engine. If the engine is flexible and user-friendly, you can adapt quickly as your needs change, differentiate your CX and keep your competitive advantage.

□ Consistent, hyper-personalized chat and voicebots

Synchronized data provides full visibility into the customer, which enables bots with the context and intent to deliver a highly personalized experience. And with a unified source of truth, the customer experience is consistent across agent and self-service channels. A unified routing engine leverages bot capabilities from both your CRM system and CX platform and levels the load across channels to improve efficiency.

Strategy 2: Streamline the agent experience with a unified workspace and real-time support

Frontline CX work is fast-paced and ever-changing. When agents are forced to juggle multiple applications and hunt for what they need, your CX suffers. Equip your team with a streamlined workflow so they can focus on what matters most — your customers. Here's what you should look for.

□ A single smart workspace

Give your agents a unified workspace that puts everything they need at their fingertips. Reduce fatigue and improve efficiency by eliminating the need to switch between multiple screens. Ensure agents can manage all voice and digital interactions, view customer data, navigate knowledge articles and access their personal performance metrics all from the same workspace.

□ Real-time AI accelerators

Support your agents during every customer conversation with AI-powered assistance. With a complete and unified customer history, a connected knowledge base and conversation analytics, AI provides real-time support. Transcription details can be sent automatically to your choice of AI solution to determine customer intent, surface relevant knowledge articles and recommend next-best actions.

□ Full context and history in one location

When agents have the full context, they can focus more effectively on the customer and resolve their issues quickly. Customer information, journey data and interaction history should be combined into an all-in-one interactive view in a unified workspace. And data that's aggregated in real time powers smarter, more contextualized self-service.

Strategy 3: Empower your team with integrated workforce engagement management and performance insights

Build a high-performance culture your employees will embrace and empower managers with AI-driven workforce planning and performance insights. Here's what your unified workspace should include.

□ Performance-boosting tools

Gamification tools tap into human psychology with game mechanics to motivate employees and help them align personal goals with business outcomes. A personalized performance dashboard with real-time metrics and customized targets keeps agents focused on monitoring and improving their performance. And team dashboards equip supervisors with actionable metrics to keep everyone on track.

□ Unified reporting and analytics

Leverage comprehensive customer information and the mountain of data your contact center generates together. Mine this unified data for new insights and trends in customer and agent behaviors. Easily create real-time and historical custom reports and dashboards to track service levels, efficiency metrics, customer satisfaction and more. Stay ahead of emerging issues and resolve them quickly.

□ Personalized professional development

Enhance agent training and coaching with a personalized approach. Through speech and text analytics and sentiment analysis, AI can analyze all interactions to identify patterns in performance across your team and for each agent individually. With agents' skill development needs pinpointed, you can target coaching sessions and learning opportunities that personalize professional development.

Your CRM system and CX platform are both critical components of a customer-centric strategy. With CX Cloud by Genesys and Salesforce, you can get more out of your tech stack and orchestrate customer and employee experiences that build loyalty.



Learn more about the benefits of CX Cloud by Genesys and Salesforce, a native solution that unifies Contact Center as a Service and CRM like never before.

[Learn about CX Cloud from Genesys and Salesforce](#)



Ready to explore how you can simplify your tech stack and expand your possibilities?

[Talk with an expert](#)

About Genesys

Every year, Genesys® orchestrates billions of remarkable customer experiences for organizations in more than 100 countries. Through the power of our cloud, digital and AI technologies, organizations can realize Experience as a Service®, our vision for empathetic customer experiences at scale. With Genesys, organizations have the power to deliver proactive, predictive, and hyper personalized experiences to deepen their customer connection across every marketing, sales, and service moment on any channel, while also improving employee productivity and engagement. By transforming back-office technology to a modern revenue velocity engine Genesys enables true intimacy at scale to foster customer trust and loyalty. Visit us at genesys.com or call us at +1.888.436.3797.

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