



Make every call count

Boost efficiency and customer service with CRM integration for Wholesale Hosted Communications

In partnership with

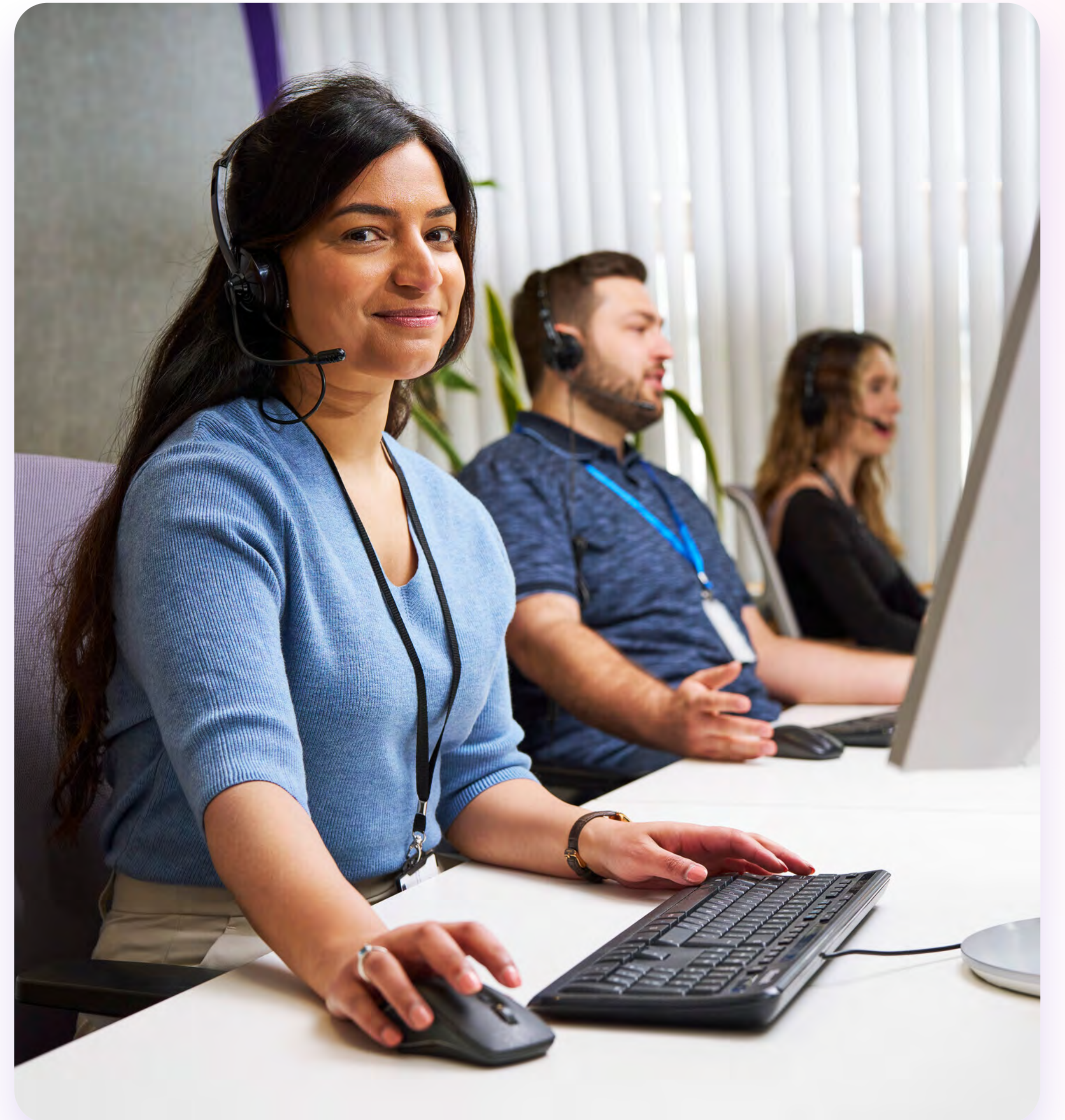




When consumers want to contact businesses, they're spoilt for choice. Many favour channels like instant messaging, self-service portals, email and AI chatbots – and firms should be sure to cater to them. Yet for many people, there's still nothing better than a good old-fashioned phone call, with **54%** of UK consumers preferring it to other methods.¹

And when people do phone, they don't want to get stuck in long call queues or be put on hold. Don't pick up the phone, and many customers will never call back. Provide poor service, and they'll start looking elsewhere.

How can your clients improve their customer service calls and boost efficiency? By integrating their customer relationship management (CRM) systems with their digital phone lines.



¹Cavell, Voice of the Consumer Report, June 2024



The right call, every time

Our CRM integration solution links your client's CRM system to Wholesale Hosted Communications (WHC), our all-IP phone service. Based on Go Integrator Cara from Mondago, it works with more than 300 of the most popular CRM systems, letting businesses immediately know who's calling and automatically bringing their details up on screen.

This means businesses can get straight to business. No waiting around while they look up the customer's details and purchase history.

What if they need to phone the customer back? They've got multiple ways of finding customer contact details. One click in the address book or call logs, and they can automatically make their phone handset dial the number.

As a result, your clients can support their customers more efficiently and provide a more tailored service. And if their customers happier, then so are yours.

Add contact [X]

Phone number: +442079460123

Type: Salesforce: Contact

Name: Joe Cartwright

Company: []

Number type: Work

E-mail: []

Notes: []

[Save] [Save and Edit] [Cancel]

Devices

Select the primary device to make and answer calls

- Deskphone
- Softphone
- Deskphone
- Mobile
- Webex

Incoming call: Ringing [X]

(London, United Kingdom)

LUK +442079460123 | London, United Kingdom

[3s]



Key integration features

Our solution lets you offer several features that lead to significant productivity gains.



Contact popping

Manually or automatically pops up a customer record when a match is found for an active call.



Add contact

Adds a record to the CRM directly from the client address book, call history page or preview window.



Presence

See the extension status and availability of co-workers, call co-workers, transfer calls, pick up co-workers calls or send callback email request, all from a dockable window.



Embedded softphone

A built-in SIP softphone that can be configured and enabled using a standard BroadWorks device profile.



Click-to-dial

Makes it possible to dial directly from the CRM.



Activity logging

Manually or automatically creates an activity record of a call received within the CRM and allows notes to be added.



Call control

Controls the user's handset with the click of a mouse, including making, answering, transferring and holding calls.



Preferred device

Lets users select which connected device they'd like to make or receive calls with.



Contact searching

Concurrently searches the integrated CRM apps and enables Contact Popping or Click to Dial from the results.



Screen reading

Dials almost any phone number visible on screen, including webpages, email signatures and protected documents.



Agent features in toolbar

A dockable toolbar that provides a simple way for a call centre agent to change settings.



Why calls are core to customer service



75%

of consumers say phone calls are the best way to get a quick response from businesses.²

66%

of customers switch suppliers due to poor customer service.³

78%

of consumers want more human interaction when contacting businesses.⁴

£1,200

is the average cost of missed business calls.⁵



A choice of licences

Our CRM integration solution offers two licences: Go Integrator Lite and Go Integrator DB. The features for each also differ slightly depending on whether your customer is using Microsoft Windows or Apple macOS.

Feature	Windows		macOS	
	Lite	DB	Lite	DB
Click-to-dial ⁶	✓	✓	✓	✓
Presence / BLF	✓	✓	✓	✓
Address book	✓	✓	✓	✓
Call history and recent calls	✓	✓	✓	✓
Preview window and missed call notification	✓	✓	✓	✓
Preferred device (multi-device support)	✓	✓	✓	✓
Call control ⁷	✓	✓	✓	✓
CRM integration (Outlook / Google Contacts / Apple Contacts) ⁸	✓	✓	✓	✓
Add contact / duplicate contact	✓	✓	✓	✓
Show contact in edit mode	✓	✓	✓	✓
Call toolbar	✓	✓	✗	✗
Busylight support	✓	✓	✗	✗
AppBar	✓	✓	✗	✗
Call settings	✓	✓	✗	✗
First login wizard	✓	✓	✗	✗
Search and call app for MS Teams client	✓	✓	✓	✓
Show, add, pop CRM contact for call ringing / answered using MS Teams client ⁹	✓	✓	✓	✓
Select MS Teams as preferred dialling device ⁹	✗	✓	✗	✓
Open MS Teams chat from Cara Presence	✗	✓	✗	✓
Show MS Teams photo / avatar in Cara Presence	✗	✓	✗	✓
Show peers MS Teams availability	✗	✓	✗	✓
SmartBusy for MS Teams	✗	✓	✗	✓
SmartBusy for Zoom	✗	✓	✗	✗
Custom events	✗	✓	✗	✓
Client API	✗	✓	✗	✓
Agent features	✗	✓	✗	✗
CRM integrations for all other applications ¹⁰	✗	✓	✗	✓

⁶Click to Dial options differ between Windows and macOS / ⁷Call control will vary by device type / ⁸Outlook Web Access only on macOS / ⁹Requires Microsoft Teams direct routing (or similar) / ¹⁰List of integrations will vary between Windows and macOS.

Transform customer calls

Help businesses bridge the gap between their calls and their customer data – whether they're already using WHC or looking for a new phone solution. We're here to help.

Learn more at btwholesale.com/whc



Offices Worldwide

The services described in this publication are subject to availability and may be modified from time to time. Services and equipment are provided subject to British Telecommunications plc's respective standard conditions of contract. Nothing in this publication forms any part of any contract. © British Telecommunications plc 2024. Registered office: BT Group plc, 1 Braham Street, London, E1 8EE. Registered in England No. 1800000.

August 2024

