

Transform your Business with CRM/PBX Integration

SMB's and SME's see big improvements in business processes when they integrate the office phone system with their CRM system.

With the explosion in affordable, cloud-based CRM systems, SMB and SME businesses now have a broad range of tools to improve productivity, collaboration and client service and give company management insight of interactions with customers. The market leaders in CRM have added mobility apps for Smartphones and Social Media integration to round out the capabilities of their software.

While many business owners are benefitting from or are planning to implement CRM, they often ignore one important CRM application; integrating voice/telephone interactions into the CRM suite.

Historically, there has been a basic level of telephone control between simple SMB CRM systems such as ACT!, GoldMine and Maximizer. This basic control was introduced in the 90's and allows a user to pop a customer screen on an incoming call and to click-to-dial a call from the CRM. The new generation of cloud-based CRM has upped the voice integration component significantly. Salesforce and Microsoft are two of the major players in the Small to Mid CRM market accounting for about 20% market share between the two. Both Salesforce and Microsoft Dynamics has a pre-tested, manufacturer-supported integration with select phone systems.

For Salesforce.com this integration goes far beyond the simple screen pop and click-to-dial and now embeds telephony call control within the application. This embedded control tracks each incoming or outgoing voice interaction that an employee has with a customer to create a true picture of voice and email contact. Call control such as answer, hold, transfer conference etc. can be accomplished from within the Salesforce application screen rather than having to operate a different application window or even touch the phone. Clickable links in a voice call record for a customer can even take you to a recording of the call.

The end result is a much more complete picture of the flow of communication between your company and your customers. And conversely, it also can highlight which customers have not had voice contact with your team in the last 6 months or longer. This information would give flag the need to reconnect and prevent competitor penetration of your base.

To discover how a telephony-integrated CRM solution can help your business thrive, contact ECI today. Since 1998 we have been your local, trusted source of business communications expertise.

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Manufacturer, pre-tested integration

Get a complete picture of customer interactions

All call control can be managed from the CRM screen – simplifies use for staff.