

CAPITALIZING ON DEEP INTEGRATIONS

This US-based firm is a lending marketplace that helps business owners grow, with equipment, financing, and working capital solutions. Each customer is assigned to a dedicated representative that provides personalized business solutions.

Customers would call their assigned representatives using a direct number rather than navigating through the company IVR. Service representatives needed to be available to the customer at all times, even when they were not in the office. When away, calls would be routed to their mobile phones. However, they did not want to provide customers with their personal numbers.

The firm needed a way to keep track of all these calls, regardless of how they were routed. They also wanted each interaction to be automatically logged into their Zoho CRM.

Additionally, the firm had previously purchased SIP trunks with multiple DID numbers and were satisfied with their current telecom provider. They needed a new customer contact solution that would allow them to keep their existing voice infrastructure.



ORGANIZATION SNAPSHOT

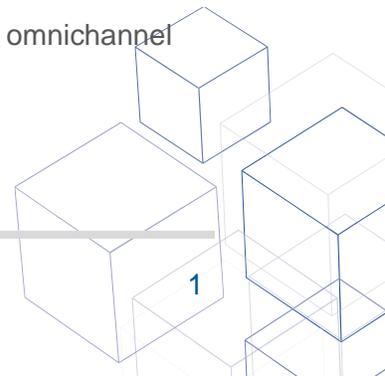
- Vertical: Financial services
- Location: United States
- Objective: Allow customers to reach assigned representatives regardless of location, while tracking all calls with Zoho CRM
- Solution: Mavenir Mobile Business Contact

IMPACT

- Implemented custom routing rules to directly connect customers to their assigned service representative, whether they were in the office or away
- Routed all calls through Zoho CRM for improved tracking and follow-up
- Reused existing voice interconnection infrastructure to minimize total cost of ownership of new solution

SOLUTION AT A GLANCE

The firm implemented the Mavenir Mobile Business Contact platform, a cloud-based, omnichannel Contact Center as-a-Service (CCaaS) solution, to meet their specific needs.



AVAILABILITY AND ROUTING

Mobile Business Contact provides skills-based routing; calls are only delivered to representatives with that particular skill. It also provides an intuitive IVR designer for custom routing rules, such as routing based on a specific representative's availability.

In this case, each representative was assigned a skill. Initial calls from a customer would connect using skills-based routing. Once the customer was assigned a representative, they were provided with a dedicated phone number to use for future calls.

This virtual number was mapped to an extension and mobile number. When the customer called the number, the IVR routed the call to the representative's extension, if available. If not, the call would be routed to the mobile number. This kept the personal number private.

ZOHO INTEGRATION

One of the key features of Mobile Business Contact is that it provides prebuilt integrations into multiple CRM platforms, including Zoho. Having a mature, tested Zoho connector available decreased the implementation time and configuration complexity for the firm. The Zoho integration ensured that all calls, regardless of how they were routed, were automatically logged into the Zoho CRM—making them easy to track and follow up.

The Zoho integration was also incredibly useful for the service representatives. It enabled:

- **Click-to-call:** They could call customers directly from their Zoho window/contact list
- **Single screen for customer interactions:** They did not have to switch between their CRM window and phone dashboard
- **Screen pop integrations:** The entire customer journey was automatically displayed in Zoho when the call connected to the service representative

BRING YOUR OWN TRUNK

The deployment flexibility of Mobile Business Contact was also a key selling point for the company. Many vendors deliver "all or nothing" solutions; implementing a new contact center solution requires a completely rearchitected voice infrastructure. This can be extremely costly and disruptive to businesses. Mobile Business Contact can seamlessly integrate with preexisting voice solutions, allowing a hybrid configuration that minimizes the business impact.

This flexibility allowed the client to keep their existing phone trunks, keeping the established relationship with their existing telecom provider. On the front end, they could use all the features that the solution offered (such as IVR, skill hunting, mobile call forwarding, reports & analytics, and CRM Integrations) while continuing to use their existing telecom provider in the backend.

"We were looking for a good Zoho integration, and the team delivered a seamless, feature-packed solution. Our representatives need to be available for clients 24 X 7 and this solution enables us to connect and track these calls with ease. We're happy with both the product and the fantastic support given by their team."

CEO – Financial solutions firm