



Solution Brief

Cisco CRM Communications Connector Overview



Today, businesses of all sizes are rapidly upgrading their network infrastructures to deliver comprehensive IP Communications (IPC) capabilities. One of the most compelling IPC applications is customer relationship management (CRM). When integrated with an IPC network, customer care solutions enable companies to more efficiently and effectively address customer needs and, by doing so, build profitable customer relationships.

To help ensure that your communications system gives you all of the capabilities you need now and in the future, Cisco® has developed the Cisco Business Communications Solution – the first smart, simple, secure, integrated voice, video, data, and wireless communications solution designed and priced for small and medium-sized businesses like yours.

As part of the Cisco Business Communications Solution, with the support of Microsoft Corporation, the Cisco CRM Communications Connector enables small and medium-sized businesses (SMBs) or empowered branch offices to provide superior customer service by connecting Cisco IPC solutions with the Microsoft Business Solution Customer Relationship Management (Microsoft CRM) application.

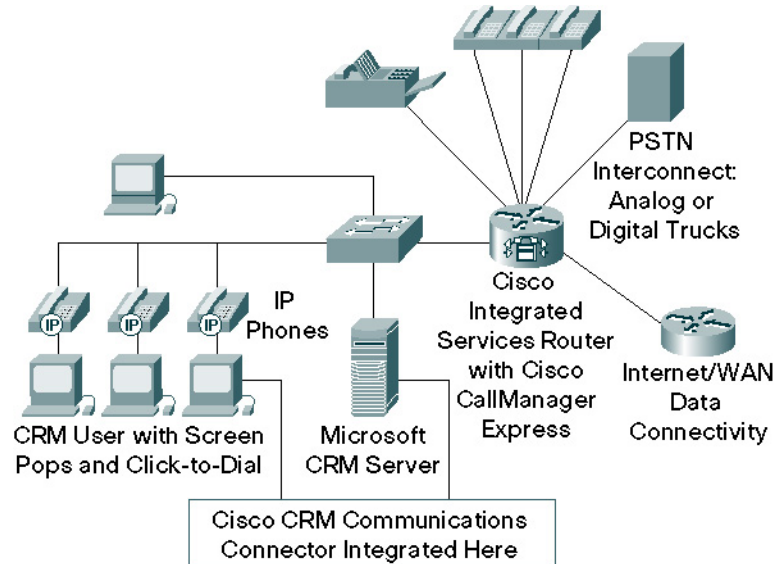
Cisco and Microsoft – Combining Strengths

The Cisco CRM Communications Connector is ideal for SMBs or empowered branch offices wanting to create a comprehensive CRM solution built on Microsoft CRM and Cisco IPC. Such a solution enables all employees within these organizations, not only call center agents, to improve productivity and deliver superior customer service.

A Complete Communications Solution

Historically, integrating a traditional private branch exchange (PBX) with a desktop CRM application required expensive specialized hardware and software, and often produced only mixed results. Installed at the desktop, the Cisco CRM Communications Connector creates one complete customer communications solution, requiring only Microsoft CRM and Cisco IPC.

Figure 1
IP Communications with Cisco CallManager Express and Microsoft CRM



Smooth Integration

The Cisco CRM Communications Connector, developed with technical information and feedback from Microsoft, is available for Cisco CallManager Express (CME), and Cisco CallManager and Cisco IP Contact Center (IPCC) Express. Cisco partners can quickly and easily integrate Microsoft CRM and Cisco IPC solutions at the desktop with no additional hardware required. The Communication Connector is now equipped with auto-detect which will identify which Cisco IP platform is currently being utilized. Additionally, the full line of Cisco IP phones is supported, from the entry-level Cisco IP Phone 7902G to the advanced Cisco IP Phone 7970G. The Communications Connector uses Microsoft Outlook or an Internet Explorer interface as the primary client for managing tasks and contacts.

Features

The Cisco CRM Communications Connector enables SMBs or empowered branch offices to fully tap the potential of both Microsoft and Cisco to provide a complete CRM solution. Its advanced feature set includes:

Screen Pops

- Opens contact record and creates new phone call activity record as call arrives
- Creates screen pops based on the caller-id of the caller for inbound and outbound calls

Click to Dial

- Supports click-to-dial feature from a Microsoft CRM contact record

Call Duration Tracking

- Accurately tracks duration of phone call and associates it with phone activity record

Call Information Capture

- Captures incoming and outgoing call information, including calling number, called number, and call start and end times

Customer Record Creation

- Easily creates a new CRM customer record when a new customer call arrives

For details on features and users please see Table 1.

Table 1. Integration with Cisco CallManager Express, Cisco CallManager, and Cisco IPCC Express

	Cisco CallManager Express	Cisco IPCC Express	Cisco CallManager
Business Types	SMBs or empowered branch offices	SMBs or empowered branch offices	SMBs or empowered branch offices
Users	240 CRM users	10 to 150 call center agents or CRM users	Up to 250 CRM users
Screen pop on incoming call	Yes	Yes	Yes
Screen pop from click to dial calls	Yes	Yes	Yes
Screen pop from click to dial calls manually dialed outbound calls	Yes	Yes	Yes
Click to dial	Yes	Yes	Yes
Tracking time duration inbound calls	Yes	Yes	Yes
Tracking time duration outbound calls from click to dial	Yes	Yes	Yes
Tracking time duration outbound calls from IP phone	Yes	Yes	Yes
Easily create a new CRM record	Yes	Yes	Yes

Benefits

The Cisco CRM Communications Connector:

- Helps increase sales and service productivity and customer loyalty by providing a single view of all customer communications for all employees within a company, not just call center agents
- Enables everyone to deliver more personal customer service from information in screen pops
- Provides ease of use and a high adoption rate because it has the look and feel of Microsoft Outlook
- Provides ease and efficiency of placing calls, using the click to dial feature
- Enables accurate and complete billing with the call duration tracking feature
- Avoids data silos inside organizations by integrating voice communications with CRM

Specialization for Cisco IP Communication Partners

Cisco offers its IPC partners an optional CRM Express Solution Specialization specifically for Microsoft CRM. While the CRM Express Solution Specialization is not required in order for Cisco IPC partners to offer the Cisco CRM Communications Connector, it is a value-add to partners who want to receive extra training that was developed with Microsoft's contributions and to identify themselves specialists. Cisco IPC partners can find more information about the CRM Express Solution Specialization at: <http://www.cisco.com/go/ciscomicrosoftsmb>.

Cisco Financing Options

Cisco Systems Capital[®] offers the Cisco IP Communications Lease and Cisco Easy Lease programs, enabling companies to install the solution today and defer capital into other areas of the organization. The Cisco IP Communications Lease provides competitive monthly payments and a turnkey solution, which allows customers to bundle product, multiyear maintenance, and professional services into a single lease payment. Cisco Easy Lease is a flexible alternative for customers who require simplified credit processing and documentation, and rapid credit decisions.

Availability

The Cisco CRM Communications Connector and Cisco IPC solutions are currently available from Cisco Certified Partners. For more information regarding Cisco and Microsoft solutions for SMBs, Channel Partner programs, and Cisco Systems Capital SMB financing options, visit: <http://www.cisco.com/go/ciscomicrosoftsmb>.

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iQ Magazine is the Cisco Systems[®] quarterly publication designed to help small to medium-sized companies (less than 1000 employees) learn how they can use technology to grow revenue, streamline their businesses, and expand services.

Each issue focuses on topics that are important to the growing business: from technology basics and Internet business strategies to streamlining operations, improving customer loyalty, cutting costs, and increasing revenue.

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LT/LW9122 08/05