



E-BOOK



# 10 Essential CRM Features for your Call Centre

Hostcomm's guide to the CRM features that will increase your efficiency and accelerate your lead-to-cash timeline.

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## About the Author



### Chris Key, CEO, Hostcomm

Chris is founder and Managing Director of hosted telephony provider Hostcomm. The business was one of the first of its kind in the UK and today offers an unrivalled VoIP network infrastructure. Chris's 20 years' experience in voice and data networking and pursuit of innovative new technologies ensure Hostcomm's services are stable, cost-effective and continuously evolving.

# How does a CRM deliver value?

In a call centre, the way you interact with your customers is the most important thing of all. Your business is built around communication. But that's not all.

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The bottom line is that every customer relationship has a goal – to convert leads into sales, and turn opportunities into revenue. That's why it's so important to carefully manage the way your people interact with your customers, and how they move through your sales pipeline.

That's the promise of a customer relationship management (CRM) system in a nutshell – to speed up your lead-to-cash timeline, make your processes more efficient, and drive your growth.

However, with so many different CRM systems competing in an increasingly crowded market, it can be hard to know which one will deliver the best value to your business and have the biggest impact on performance.

## The answer is simple:

Focus on your needs first, and investigate how a CRM system addresses those needs. Read on to find out how.

# Act fast on every lead

When a lead comes into your business, someone needs to act on it while it's hot. An efficient response is essential if you are to turn that lead into a customer.

A CRM can help you manage your response, while logging all customer contact and the information you have collected for future reference.



Whether you're making outbound cold calls or receiving enquiries through your website, sales leads can come from just about anywhere. Call centres increasingly use multiple platforms to support their work, and a CRM system needs to be ready for all of them.



## Look for VoIP and dialler integration

If you're using a dialler for your calling, it's essential that your CRM system integrates fully with it. Some systems allow leads can be dropped directly into the system based on call dispositions, with customer records created accordingly.

What's more, VoIP integration with your CRM system gives you new ways to help your agents perform. Relevant customer records can 'pop' onto the screen based on incomer caller IDs, or users can click a single on-screen button to make an outbound call from the CRM.

This eliminates repetitive manual processes like manual dialling or rushing to find the relevant customer record when a call comes in.



## Look for support for web forms

As well as working with your dialler, the right CRM system should connect with your website. If it does, it's possible to drop leads from website forms directly into your CRM system and your dialler queue.

As a result, your agents can react faster to website leads and enquiries, acting on new opportunities while they're warm and helping you to generate revenue faster.

# Gain efficiencies with end-to-end processes

Every sales pipeline looks different, but one thing is for sure – you want the entire process to be fast, controlled, and efficient at every stage.

However, the manual parts of the process slow it down entirely. When your agents need to carry out follow-up admin or conduct different tasks across several systems, a fast process can quickly grind to a halt.

Worse, manual processes are prone to mistakes – a forgetful agent or a click on the wrong icon could disrupt the sale completely.

Thankfully, the features of the right CRM system will help you eliminate these manual processes and drive efficiency.



## Look for workflow automation

The more parts of your sales process that happen automatically, the lower your risk of errors and the faster the process overall. That's why many CRM systems offer workflow automation, which triggers specific events based on certain criteria.

For example, when a customer asks for more information after an initial cold call, your agent might need to write an email. This takes them away from the phone, where they could be working on new leads.

Workflow automation could take care of this process automatically, based on the disposition of a call. As a result, your agents can focus on what they do best – making sales and generating revenue.



## Look for an API for integration

In modern businesses, few processes are limited to a single application. Instead, agents work across several hardware and software systems.

With an application programming interface (API), your CRM system can be integrated with almost any other system. This presents new opportunities to automate across platforms, share data seamlessly to and from your CRM system, and bring all your systems together as part of one cohesive process.

# Convenience and control

If your CRM system is well-implemented and highly integrated with systems like your dialler and your phone system, a wide range of people will be using it. This brings with it some specific considerations.

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Fundamentally, different people will use the system in different ways. Some may be relying on automatic screen-pop to bring CRM system records to the dialler, while others may be using the same few CRM features repeatedly.

With that in mind, you need a system that strikes the balance between convenience and control – something that’s easy to use day-to-day, but also ready to support more advanced processes and workflows.



## Look for a customisable user interface

As they try to cater for all types of businesses, many CRM systems become bloated with a huge number of features and input fields. Inundated with menu options, your users need extensive training to find their way around – and may still struggle to work efficiently.

Check that your chosen CRM system allows you to customise the user interface to your organisation. If it does, you’ll be able to hide the features that are rarely used (or move them to an unobtrusive place), while the features you depend can be accessed quickly and easily.



## Look for complete database access

At the other end of the scale, power users may need to conduct advanced reporting using a system like Crystal Reports, make manual database backups, and work with raw data in other ways. Unfortunately, many of the most popular CRM systems are hosted on shared servers, which makes full database access impossible.

The customer data in your database is yours – a valuable business asset that you should be able to access and use however you want. To ensure this, look for a CRM system that’s hosted on a dedicated server and provides full access as standard.

# Robust security and easy data sharing

In recent years, the CRM sector has increasingly moved to the cloud and a number of hosted applications. This shift brings with it new flexibility, like a streamlined implementation and the ability to access your system from anywhere.



However, web applications are hard to keep secure – and your new flexibility should never come at the cost of protecting customer data.

That's why you need a system that's built on the foundation of reliable, enterprise-grade security. In turn, you can share data and allow widespread access to parts of your system with complete peace of mind.



## Look for a dedicated server with powerful security

Many CRM systems are hosted on shared, multi-tenant servers, where several users share the same hardware resources. However, this can never be as secure as your own dedicated server which only your approved IP addresses can access.

Always find out how your system will be hosted and, ideally, look for a dedicated server with its own firewall and an SSL certificate to encrypt data transmitted to and from the server.



## Look for a secure customer portal

When your CRM system and its data are both secure, you can confidently allow access without increasing your risk of a breach. In particular, some CRM systems offer secure customer support portals – although in some cases these are a costly add-on product.

After logging into a part of your CRM system from your website, customers are able to check their personal details, raise support issues, and track the progress of queries. As a result, you can continue to get value from your CRM system for the longer lifetime of your customers, and deliver the best service by engaging customers in open, two-way, secure communication.

# The flexibility to change

When you consider your current needs as a business, you can steer your search for a CRM system in the right direction. Just search for a system that can effectively address each of those needs – and is available at the right price. But there’s one complication. Your needs probably won’t stay the same.



The things you need from your CRM system right now could be clear, but the future is much less certain. You’ll need to be ready to react to changes in your industry, the market, and your competitors. It’s only with this agile approach that a CRM system can continue to deliver huge value for the long-term.



## Look for extensive plug-in support

Your chosen CRM system needs to be easily extendable with new features and functionality. The last thing you want is to rely on a vendor to add the features you need in years to come. If they do, they are likely to come at considerable cost.

Instead, choose a CRM system with support for packaged plug-ins – add-ons that you can bolt onto your system at a later date. These could include new reports, connectivity to new applications, and much more. Even if they don’t seem essential now, they could become essential anytime.



## Look for flexible storage costs

Over time, your CRM system database will naturally grow as you add new records for each customer. This presents some practical storage problems that can quickly become costly.

In some hosted systems, your options for data storage could be fairly limited. Your provider may require you to upgrade storage on their terms, or even grow your storage automatically to meet demand – and bill you for it without notice.

Ideally, find a CRM system that puts you in control of your own storage. If your system is hosted on a dedicated server, you can choose to archive older records, add new storage modules to the server, or migrate to a larger dedicated server. With this flexibility of choice, you can make the decision that fits your business – and your budget.



# 10 essential CRM features

## At a Glance

There are several criteria to consider when you're choosing a CRM system, and each call centre will have its own priorities. Some things will matter more than others. But, at-a-glance, the best CRM systems will include:

- 1 VoIP and dialler integration
- 2 Web form support
- 3 Workflow automation
- 4 A flexible API
- 5 User interface customisation
- 6 Full database access
- 7 Dependable security (on a dedicated server)
- 8 A secure customer portal
- 9 Support for plug-ins
- 10 Several ways to increase your storage



# Get the Advantage of a VoIP Cloud Contact Solution with Hostcomm

Since 2004, Hostcomm has been helping inbound contact centres, outbound contact centres, and other businesses with hosted VoIP telephony services and hosted, cloud contact centre services.

We use our experience in VoIP telephony, SIP trunking, and hosted predictive diallers to deliver technology your business can depend on. And we use our experience in working with contact centres to design solutions that make good business sense. We'll help you find the right technology to deliver tangible business benefits. We'll get you up and running with expert consultancy and training, and keep you operational with ongoing technical support and monitoring.

**All as part of a simple, cloud-based service available for a monthly subscription fee - with no capital expenses.**

## We can show you all 10 essential features and more.

Let us know your requirements and we'll tailor a demo to fit your needs:

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