

Quadi7ent® Inspire Plug-in for Salesforce®: improving customer communications productivity

Dysfunctional friction is
slowing down your service
rep's productivity



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Congratulations are in order. You have implemented a powerful CRM so that all your customer data is readily available to your customer-facing service reps and agents. They can instantly access customer information, and place that information in response documents. Your productivity should be up.

So why does it seem like everyone is slowing down?

Your productivity metrics are not actually improving. In fact, they seem to be heading in the opposite direction. Wasn't a CRM supposed to help your teams perform better? How do you explain the decrease in productivity to upper management?

What's occurring is the classic paradox of tool-based productivity management – the belief that new tools will create increases in productivity, when in fact they can have the opposite effect. There are a few reasons why this paradox occurs. The first of course is a learning curve. As teams implement new tools it takes time for them to learn the tool and integrate it into their own workflow. However, that's usually just a temporary drop in productivity. The more insidious productivity drain is because of dysfunctional friction – which happens when we switch tasks or modes of working.

In a recent survey¹ of 2000 office workers, 54% of users have more than 5 different computer programs running at once, and 59% feel they're wasting time switching between apps. Workers in general are not good at task switching, and when they are forced to switch from one tool to another it takes time for their brains to switch over to a new task workflow. Every application works in slightly different ways and requires different muscle memory to use effectively.

So, while the CRM gives them access to new data, having to switch back and forth between your customer communications applications and your CRM data means they are switching back and forth between services and being thrown into two completely different user flows and workflows constantly.

¹ Encourage Remote Work and Software Consolidation to Help Keep Employees Focused" blog by Mark Strassman, June 26, 2019.

Higher pace of calls leads to friction and frustration

As a result of the pandemic, contact centers everywhere are seeing a huge increase in the number of inquiries and number of personalized responses they need to execute. Whether it's a proposal for a customer seeking additional services or sending a status notification of a customer service inquiry, the volume of communications has rapidly increased. Add to that the error-prone, manual, time-consuming tasks such as cutting and pasting customer information from one screen to the next means customers are often left on hold. It is not uncommon for agents to accidentally copy information from one customer's order into another request or to grab the wrong customer contact data. This often results in poor customer experiences and more calls into customer care from clients who are upset. Multiply these issues by a factor of 100 or 1000 and you can see that friction can add dysfunction and real cost to the bottom line.

Manual task switching = multiple error routes

The above situation plays itself out in customer contact centers in every company – stress points cause people to task switch faster increasing the likelihood that they will make errors. The more steps processing customer requests take, the more systems they need to switch between, the more likely the errors. And these errors are costly. Poor customer service costs companies \$338B annually. The average value of a lost customer relationship is \$243. And errors are a major factor in driving customers away.

Time to respond

Time to respond is also impacted when workers are forced to continuously switch between systems. The typical flow of a customer response document involves searching for templates, selecting the correct template, typing in or copying customer information into the template, sending that document off for approval, revising and editing the document based on feedback and compliance requirements, then sending the document off to production – either as a mailed document or an electronic response. In a busy contact center there are many different tools that staff can use to perform these tasks, and the manual work of these is both time consuming and frustrating to the worker. The more steps involved, and the more compliance checkpoints required, the more time it takes to close out each file. And the longer it takes to get to the end of the task, the more frustrated the end customer ends up being.

Managing ongoing relationships

What every customer wants is to feel heard. The success of your ongoing customer relationships is your ability to communicate consistently with that customer across any medium and to have a record of communications throughout the customer lifecycle that is easy for any customer contact point to access and understand. What's frustrating to customers and staff is when prior communications are lost and information has to be repeated or when one customer rep doesn't know what other reps have told them. An offer sent by text by one group may be inaccessible to members in another group when a customer calls in to inquire about it.



Salesforce® + Quadient Inspire: the best of both worlds

Implementing a CRM like Salesforce® is one step in ensuring that customer information is centralized. And adopting a CCM (Customer Communications Management) solution can help ensure that information being sent to customers is personalized, compliant and consistent across any channel.

Combining both of these tools can dramatically improve productivity, responsiveness, customer satisfaction, and compliance across multiple customer communication channels.

Introducing the Quadient Inspire Plug-in for Salesforce®

This is where the Quadient Inspire Plug-in for Salesforce® comes in. The plug-in connects Salesforce® customer data with Inspire's customer communication templates and workflows and brings that experience right into the Salesforce® console. It's designed to help business users easily and accurately create personalized customer communications without having to switch between multiple programs or copy data manually from one system to another.

The customer communications journey

By integrating these two systems users can quickly optimize and personalize communications at every step of the communications' journey.

Template search & selection

From within a customer record, the user can start a search for an approved template to base their communications on. The user can enter keywords and the search will return a list of matching templates. This keeps them from having to search for approved templates in unrelated document folders and ensures that they always have the most up-to-date version of the template available, while spending less time looking for them.

Communication authoring and editing

The document selected will open in the same browser and will include the right customer data from the record pre-populated with Salesforce data as well as other data from other relevant systems and applications. The user can then edit the template as needed and add any other additional customer information from Salesforce® fields. It minimizes manual data entry, which can help to prevent errors, and reduce the amount of time required to author customer communications.

Workflow & approval

Customer communications that are personalized by front office workers often require some form of review and approval by managers. Connecting Salesforce with Inspire means users can pick a communication template which launches Inspire's Interactive interface for business users within the same browser experience, where they can edit, approve, finalize and send on for additional approvals.

Production & multi-channel delivery

Finally, the approved customer communication can be sent off for production and delivery, or received back to the Salesforce record for local distribution. Using Quadient Inspire Scaler in the background, any necessary orchestrations for creation and delivery of the final document through various online or print channels will be carried out. Communications can be delivered via email, web, print, SMS, Whatsapp, or mobile push notification, and a copy can be uploaded back to Salesforce to help form a complete communications history of your customer interactions.

In the future, users can quickly refer to any and all communications sent to the customer, speeding up follow-up interactions.

Summary of benefits

The integration of Quadient Inspire with Salesforce® will bring about an improvement in productivity as the dysfunctional friction of task switching and manual data entry are eliminated. Processing of customer communications will be sped up while still being highly personalized and compliant with necessary regulations and controls, across any channel. For organizations who have standardized on Salesforce® as a CRM tool, and have implemented or are planning on implementing Inspire Interactive and Scaler to manage omni-channel customer communications, the Quadient Inspire Plug-in for Salesforce® is a highly recommended integration.

Customer care can be manageable and frictionless

With Quadient Inspire and Salesforce® working hand in hand, contact center agents and sales representatives have much more control over their customer interactions. Instead of copying and pasting customer information from their CRM into a form, those forms can be part of their CRM workflow and automatically tied to the customer record. It can also be sent through any customer-preferred delivery channel.

After the sale, many of the customer communications required to manage the contract and keep the customer engaged can also be automated. A host of customer messages can be developed and scheduled, from an automated email to the customer with their contract and a digital signature request. An emailed and mailed version of the completed contract can be developed and automated as well.

Post sale, customized offers can be created and other services or upgrades can be scheduled, with notification reminders being sent via email, SMS, mail, or all three.

Quadient Inspire's Plug-in for Salesforce® can help bring enhanced function to any team. To find out more quadient.com/resources/SFDC



inspire
Plugin for Salesforce

About Quadient Inspire:

Quadient Inspire enables organizations to create and deliver personalized, compliant customer communications across all digital and traditional channels, from one centralized hub.

Learn more about Quadient Inspire at www.quadient.com/experience.

quadient
Because connections matter.

About Quadient®

Quadient is the driving force behind the world's most meaningful customer experiences. By focusing on Intelligent Communication Automation, Parcel Locker Solutions and Mail-related Solutions, Quadient helps hundreds of thousands of customers worldwide simplify the connection between people and what matters.

For more information about Quadient, visit quadient.com.

