

# intelli-CTi for Sage CRM

## Integrated telephony and Sage CRM

**Computer Telephony Integration (CTI) provides the missing link between telephony systems and Sage CRM. With CTI, businesses can see who is calling them and dial contacts on-screen through GoldMine.**

This can cut seconds on every phone call adding up to hours saved across an entire team every week thereby reducing business overheads. By making telephony part of the infrastructure, call statistics, campaign responses and data quality can all be captured and assessed within the Sage CRM interface.



### Introducing intelli-CTi

Intelli-CTi, extends the capability of a phone system enabling computers to interact with it allowing both to handle voice and data traffic. By bringing together two of the most important tools in any business, gains can quickly be achieved through enhanced customer service, increased productivity and better reporting.

#### How businesses benefit from intelli-CTi:

**Deliver excellent service by phone** – Calls are previewed before answering so the person best able to help can answer and personalise their greeting. All customer details are on-screen.

**Increased staff productivity** – Caller ID means more incoming calls can be handled and outbound calls can be made quicker using one click dialling to improve efficiency.

**Better reporting** – Call statistics provide powerful data on agent/team performance, call levels and real time reporting throughout the day.

**Lower costs** – Save time on each call there's capacity to increase call time minutes and reduce overheads.

#### How Sage CRM users benefit:

- Discreet screen-popping displays contact and account details for incoming calls even before the phone is answered without interfering with the applications currently open.
- One click power dialling from Sage CRM means calls are made quicker and wrong numbers are eliminated.
- Manage phone and Sage CRM systems from a single desktop interface.
- Retain caller ID information on calls transferred.
- Customisable user preferences and LCD style displays provide visual feedback of call status.



intelli-CTi is developed to integrate with most leading CRM applications including, ACT!, Sage CRM, GoldMine and Saleslogix. With wide switch coverage, intelli-CTi enables businesses to extend the value of their CRM system whatever phone system is used.

By making telephony a key part of IT infrastructure a completely integrated customer service is achieved with a streamlined sales and marketing operation.



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## Know who is calling. Use intelli-CTi to improve customer service.

When a call is received, intelli-CTi searches Sage CRM and shows call agents who they will be talking to. With 'handsfree' call previewing and retrieving customer information, staff are able to provide the individual care so customers always feel valued. With intelli-CTi, customer service is always high quality as calls are handled intelligently from the start.

## Make phone calls on-screen to increase talk minutes and increase user productivity.

A recent DTI Computer Telephony Integration report found up to as many as 10% of outbound phone calls are misdialled. The cumulative time to make a call, even when its dialled correctly, adds up to a sizeable financial cost. intelli-CTi one-click dialling from the desktop eliminates dial errors to free up staff time to make more calls and carry out more profitable work. The same report also found automatic caller identification can cut at least 20 seconds off each call. Using intelli-CTi screen-popping caller ID, seconds saved off each call add up to a saving of over 5 hours for every 1000 calls made by a team!



### On-screen call handling

intelli-CTi provides an on-screen call handling application, SoftPhone, to manage calls. SoftPhone with its 'always on top' display option, appears next to Sage CRM and with its unique One-Touch Telephony feature, gives users full control of the call. If your phone system already uses a proprietary softphone with other enhanced features, intelli-CTi can use that instead.

### Intelli-CTi Desktop Edition

Desktop Edition is the key middleware component of intelli-CTi delivering fundamental CTI in TAPI and TSAPI environments and enabling users to identify customers as the phone rings and use power desktop dialling. This core component can be integrated into a range of third party systems using the intelli-CTi Software Development Kit. QGate and their partners including Preact have enabled integration with CRM systems including SAP, Saleslogix, ACT!, and Sage CRM.

### Flexibility for now and the future

One key issue is future proofing. intelli-CTi has been designed to be open and flexible removing the need to re-engineer the integration should the IT environment change.

### Who is intelli-CTi for?

intelli-CTi is an ideal solution for any call centre but its benefits mean any customer facing teams would find it invaluable including:

- Sales Support
- Service Desk
- IT Help Desk
- Credit Control
- Helpline
- Technical Support

### intelli-CTi integrates with:

- Any TAPI or TSAPI compliant phone system.
- Leading CRM software applications including: Sage CRM, ACT!, Saleslogix and GoldMine.



To find out more about intelli-CTi and to see a demonstration call Preact on 0870 382 5000.