

Salesforce CRM Integration

Drive personalized interactions and boost agent productivity with a 360° view of customer context in a single console

Enterprise agents spend 35% of their working day toggling between their conversation console and Salesforce's CRM systems. That's a lot of wasted time—for companies, and customers. Integrating the [24]7.ai conversation console with your Salesforce CRM application can reduce time wasted by up to 25% and allow agents to access customer information from a single console to reduce average handle time (AHT), operating costs, and customer frustration.

Where agents are losing time

- Toggling screens to complete customer verification in CRM
- Copy/pasting information from Salesforce CRM to provide options to customer
- Creating case and pushing Chat transcript to Salesforce CRM
- Correcting manual errors committed due to high concurrency and toggling
- Filling disposition forms in two systems

Driving results for a top US banking client

- 7% reduction in AHT
- 12% improvement in ART
- 3.25 pts improvement in NPS

*Deeper integration can provide higher benefits

Key Business Benefits

Easier integration

Out-of-the-box connectors make integration a snap.

More productive agents

Single user interface, combining Salesforce CRM system and agent conversation console puts full context and customer information at their fingertips.

Happier customers

Streamlined service helps to speed up resolution.

Key features

- Allow agents to interact with customers and update their Salesforce CRM records from a single user interface – Agent Conversation Console and CRM application
- Improve average handle time (AHT) and average resolution time (ART)
- Increase conversions
- Reduce manual errors
- Search for records by name, email address, or account

Two Integration Options with Salesforce CRM

Streamlined agent experience

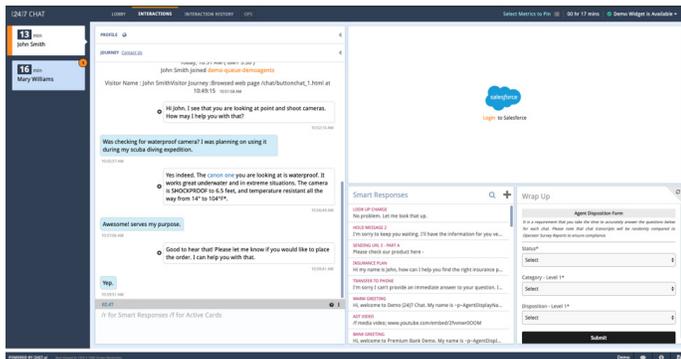
Our data shows about 20% of information during chat interactions is read from CRM systems, and 35% is pushed back into them. Give agents a single user interface to push and pull information between the customer interaction and the Salesforce CRM system. Agents can instantly pull up, edit, and update customer records without leaving the interaction, so they can focus on the customer.

Two integration options

Choose to integrate as a widget in the [24]7 Chat conversation console, or to embed chat as a widget within the Salesforce CRM system.

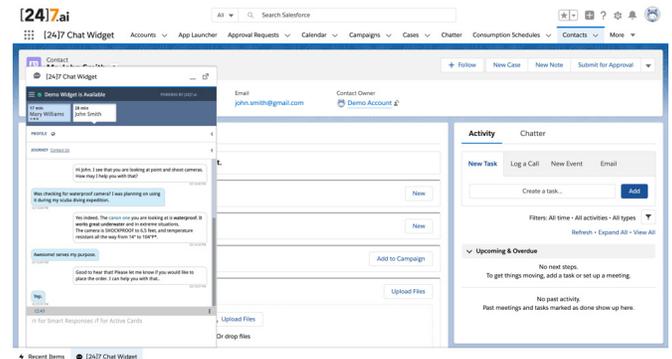
Option 1: Integrate Salesforce CRM widget into [24]7 Chat conversation console

Agents see the Salesforce CRM widget in the “workspace” portion of the [24]7 Chat conversation console, showing customer data based on identified intent. Agents can instantly search key customer data and product information as well as update CRM records, giving agents a superior experience. Direct integration requires no client-side development.



Option 2: Embed [24]7 Chat as a widget in Salesforce’s CRM system

[24]7 Chat can embed a small widget into the Salesforce’s application with the same customer interaction context. The [24]7 Chat widget can communicate with the hosting application to ensure matching records for the customer are presented as the agent manages concurrent chats.



To learn more about the [24]7.ai Salesforce CRM integration, [contact us](#) today.

Contact us today

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About [24]7.ai

[24]7.ai is redefining how artificial intelligence and human insight are combined to produce satisfying customer experiences. Our conversational AI platform predicts consumer intent to create frictionless interactions, across every channel, that strengthen relationships and increase brand loyalty, at the lowest cost per resolved conversation.

For more information visit: www.247.ai