



Industry's second largest professional employer organization is able to decrease call handling time 12-15 seconds per call

OVERVIEW

Why AMC Technology?

INDUSTRY

Professional Employer

COMPANY PROFILE

TriNet is the industry's second largest professional employer organization and provides small and midsize businesses with a full-service HR solution

GOALS

To seamlessly migrate from Peoplesoft to Salesforce with Avaya, identify customers earlier and view the total cost of individual clients within Salesforce

SOLUTION

Integrating Salesforce and Avaya using Contact Canvas for a unified user interface and out-of-the-box features

BENEFITS

Increase in agent efficiency and an opportunity to better serve customers - saving up to 15 seconds per call in a contact center that takes between 2,500 and 4,000 calls per day

CASE STUDY

TriNet + Contact Canvas

Earlier in 2009 before TriNet and Gevity merged, the two companies had both already determined that computer telephony integration with CRM was something they wanted. TriNet was in the process of implementing AMC's Contact Canvas to integrate Avaya AES and PeopleSoft and it was later decided that PeopleSoft would be their go-forward platform utilizing Contact Canvas when the two would become the industry's second largest professional employer organization (PEO).

In October of 2016, TriNet decided to migrate away from PeopleSoft and adopt Salesforce. There were a couple of different drivers for this decision, the cost reduction and a desire to move towards a cloud based infrastructure. A portion of their business was already using Salesforce and it made sense to extend tracking from lead generation all the way through implementation.

Since the transition to Salesforce, the user base is happier. While they are not using all of the feature-sets available in Salesforce and Contact Canvas Agent yet like Omni-channel and Lightning, they are growing into everything that Salesforce and Contact Canvas Agent have to offer and will be looking at chat and Lightning later this year. "The user interface is a plus, much more intuitive and significantly fewer customizations were needed to get the same functionality that we had on the PeopleSoft side. The product is very stable with very few reboots required since our cut over in October," shared Dave Rose who manages Telecomm Operations within the IT Systems Infrastructure team at TriNet.

Dave Rose's advice for someone implementing CTI is "to know what data is available and what data you want to make decisions on, changing it after the fact can be costly". Almost everything TriNet has done has been out of the box. Their call routing and screen pops are based on call attached data.

"It was very pain free to migrate. Our support has always been great with AMC."

Dave Rose,
Telecommunications Manager, TriNet



“Without working hard, you can justify 7-15 seconds saved across 2,500-4,000 daily calls in our main customer service center.”

Dave Rose,
Telecommunications Manager, TriNet

Features the agents especially like are “the user interface, understanding their status and how they can change it. It’s embedded in Salesforce as opposed to being in a separate PeopleSoft window. Single sign on has been great so agents don’t have multiple sign-ons,” continued Rose. “To the best of my knowledge, there weren’t any business needs that weren’t met. We’d be the first to run it up the flag pole if there were!”

Another benefit TriNet has seen since migrating is that they have been able to implement additional functionality on the IVR to better track the customers. “We now have the ability to identify our customer earlier. We expect to see the total cost of individual clients which we weren’t able to see on PeopleSoft,” said Rose.

Rose admitted that they did evaluate another vendor for their Avaya integration when they decided to switch to Salesforce. Keeping Contact Canvas for their 636 agents was the least disruptive and the least costly, however. Because Contact Canvas is built for dynamic organizations, changing platforms on the telephony or CRM side is easy. In the end “it was very pain free to migrate,” stated Rose. “Our support has always been great with AMC.”

When asked what the solution benefits have been, Rose shared that “There have been two benefits of CTI – increased efficiencies and increased opportunities to better service our customers. Without working hard, you can justify 7-15 seconds saved across 2,500-4,000 daily calls in our main customer service center. Identifying your customer early and opportunities to target market to them as they make their way to the call center is worth it. We had a week where screen pops weren’t available and we were able to validate that call handle times decreased by 7-15 seconds!”

ABOUT AMC TECHNOLOGY

AMC Technology is a global leader in contact center and CRM integration with a vision for improving the customer experience through increased agent efficiency and personalization capabilities. With over 23 years of experience, AMC Technology leads the market in providing contact center integration expertise and best practices. AMC powers contact centers and customer interactions for companies around the globe through its certified platform – Contact Canvas™ and unparalleled expertise. AMC products are certified by technology partners and allows businesses to more effectively manage all types of customer relationships while delivering superior levels of customer service and improving productivity.

AMC TECHNOLOGY, LLC.

www.amctechnology.com

teamsalesforce@amctechnology.com

phone | 804.419.8600

toll free | 800.390.4866

fax | 804.419.8601

1707 Summit Avenue
Richmond, VA 23230