



Smooth Integration Solutions that Customers Remember



Industry: Investment

Headquarters: Boston, Massachusetts

“The product install was easy and it just worked.”

- Putnam Financial

Integrating customer relationship management systems (CRM) with computer telephony systems (CTI) can often be an involved task for call centers due to the specific needs of each platform. When Putnam Investments switched their platforms in 2014, they found this out directly. Because Putnam had worked with AMC Technology previously, when the difficulties arose, they contacted AMC.

Putnam purchased AMC Technology's solution in 2010 for integration between Salesforce (CRM) and Aspect (CTI). However, due to vendor consolidation implemented in the summer of 2014, Putnam partnered with a competitive CTI integration provider when they switched their CTI platform to Cisco.

Putnam quickly discovered the process of integrating the two platforms was going to be a challenge. Requirement discussions were difficult, they continued to experience issues within production that didn't appear during testing, but had to continue operating an active call center in parallel.

With a tight deadline and lowered credibility for the company, Putnam IT managers reconnected with AMC Technology to discuss integrating with Contact Canvas instead. A representative from Putnam recalls by stating **“The product install was easy and it just worked.”**

Within a week, Putnam's agents were back to work, successfully running AMC Technology's integration software effectively connecting Salesforce with Cisco.

Solution

AMC Technology not only provided a solution to the issues, but gave the agents new features such as:

- **Flexibility** - click-to-dial, Contact Canvas™ dial pad and the Cisco phone options
- **Options** - ability to transfer using a consultative call or one-step transfer, hold and conference with multiple parties.
- **Security** - adding login customizations on passwords and extensions

Benefits

With AMC's integration for Salesforce and Cisco, Putnam's employees were able to save time because the product worked correctly and filled their call center needs. Customers were able to receive their answers swiftly and agents did not have to hassle with incongruent systems.

“AMC's support in answering questions and squeezing us into a very aggressive schedule was refreshing. The product worked as well as we'd hoped and the business is once again happy,” stated Putnam's Senior IT Manager.

AMC TECHNOLOGY

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