



 Digital DOC

PRIVATE CASE STUDY FOR DIGITAL DOC

# Streamlining business development through Amazon Connect and Salesforce integration

The Amazon Connect solution rockITdata implemented for Digital Doc is designed to create an outbound dialing solution for business development efforts from Salesforce. It is designed to grow into a full-blown call center ecosystem in the future.



## Problem Statement Defined

With the Digital Doc sales process automated from lead to quote in Salesforce, it was time to focus on automating and measuring the inside sales business development process and provide them with the capability to easily follow up with prospects. rockITdata recommended leveraging the CTI (computer telephony integration) capabilities already provided in the Salesforce platform along with Amazon Connect as the telephony solution to provide “click to dial” from a contact record in Salesforce. This allowed the sales team to continue to prospect from within Salesforce, requiring minimal additional training. From Salesforce, the call activity metrics can be tracked and reported on to provide the management team with data and visibility into business development productivity as well as the ability to identify training opportunities for the team.

## Use Cases

 Business Applications

 Data & Analytics

 Databases

 Migration

## Proposed Solution & Architecture

rockITdata proposed the Amazon Connect solution because it can scale as a full-on virtual call center, if needed, in the future. The goal of this project is to deliver an exceptional outbound dialing experience from within a single platform, leveraging Salesforce to support the business development team and make their jobs more efficient while providing call dispositioning metrics for reporting and analytics to assist the management team with overall visibility into productivity, close rates, process improvement, training opportunities and sentiment analysis.

## Outcomes & Success Metrics

The Amazon Connect solution is integrated with the Digital Doc CRM (Salesforce) for capturing business development activities by the inside and outside sales teams, further leveraging an existing tool without the need for another system. The solution implemented has now enabled the client to verify sales activities and identify insights from sales calls that they didn't have before. It has also reduced the training time required for new sales staff by utilizing features like call recording and translation from AWS Connect from internal training opportunities as well as the ability to easily search calls for sentiment and follow up with prospects. Digital Doc can use Salesforce Partner Portal Licenses as opposed to full Salesforce CRM licenses, leading to approximately a 50% cost savings on licensing fees for Digital Doc. In addition to the outbound dialing capabilities for Digital Doc, the Amazon Connect solution rockITdata implemented offers a larger portfolio of enhanced customer support options yielding customer savings of approximately 30%. Services like website chat, support across all channels, skills-based routing, voice support, knowledge base for customer self-service and the ability to support remote work and analytics to determine effective utilization of resources are available as the Amazon Connect and Salesforce solutions continue to evolve at Digital Doc. This solution also enables the customer to easily migrate to an outsourced customer support model if needed.

**50%**

**cost savings** on licensing fees for Digital Doc using Salesforce Partner Portal Licenses

**30%**

**customer savings** through a larger portfolio of enhanced customer support options

## Lessons Learned

- Identify a "Super User" early to be responsible for training on Connect functionality and be able to set up and manage reporting and analytics.
- Keep the solution simple and manageable, even though it is tempting to overcomplicate it with all the available Connect features.
- Provide a check list for system compatibility, such as browsers and microphones.

CONTACT US

**Better customer experiences start here.**

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