CUSTOMER STORY

talkdesk | Campaign Monitor

User Case
Sales

Industry
Software

Integration
Salesforce, Slack

Key Metric
↑ Agent Productivity

Challenge

Campaign Monitor was using multiple disparate contact center solutions lacking a strong integration with Salesforce, which restricted its reporting and analytics, and made it difficult for agents to personalize customer interactions

Solution

Campaign Monitor consolidated its contact center operations with Talkdesk, leveraging Talkdesk for Salesforce to dynamically screen pop cases as soon as a call came in, while automatically syncing data in real-time between the two systems

Results

Campaign Monitor has drastically increased agent productivity by automating previously manual tasks with Talkdesk for Salesforce, as well as using email and Slack alerts to streamline communications within the contact center

Turning Complexity into Simplicity

Consumers are bombarded every day with marketing and advertising through emails, social media and the web, presenting a challenge for businesses aiming to have their own messages heard. Innovative marketing campaigns that cut through the noise and catch on with consumers are often the result of countless hours of hard work by large, sophisticated teams. Campaign Monitor is software which enables marketing teams to easily create, send and measure the impact of email campaigns.

Vivek Visvanathan is Director of Go-to-Market Operations at Campaign Monitor, and his mission is to empower teams to deliver a quality of service customers expect from a company that's focused on simplicity, innovation and great customer experiences. Visvanathan ensures the tools used by the sales, support and customer success teams boost productivity, increase customer satisfaction and positively impact sales.

Disparate Solutions Create Inconsistent Experiences

The challenge for Visvanathan was that nearly every team was using a different contact center solution, making reporting and analysis difficult as key data was being captured and stored in disparate systems. The sales teams were using a common inside sales software to make and receive calls, but were unable to customize which fields leads were mapped to in Salesforce, Campaign Monitor's CRM. The customer success team was using a legacy PBX phone system that made and received calls, but did not offer the robust capabilities the team needed to log and report on customer interactions.

Visvanathan realized the inefficiencies of using multiple solutions and decided to search for a new, unified contact center solution. Campaign Monitor's support team recommended Talkdesk, as they were using it to power their own customer experience. With phone being a critical channel for the team, it was important for Visvanathan to move forward with an established vendor that had already been put through the test. After checking off all the required boxes, Visvanathan chose Talkdesk as the solution of choice to consolidate and improve his contact center operations.

> "Talkdesk's seamless integration with Salesforce allows our teams to do their jobs without having to worry about being slowed down by manual tasks."
>
> **– VIVEK VISVANATHAN, DIRECTOR OF GO-TO-MARKET OPERATIONS**

Automating the Way to Success

Talkdesk for Salesforce helped boost agent productivity by automating the once-manual task of entering customer and prospect data into Salesforce. With Talkdesk for Salesforce's comprehensive workflows and automations, agents spend less time entering data and more time having successful calls. "Talkdesk's seamless integration with Salesforce allows our teams to do their jobs without having to worry about being slowed down by manual tasks," said Visvanathan. Case screen pops immediately present agents with contextual caller information straight from Campaign Monitor's Salesforce database, enabling them to have more personalized and effective conversations. Because all data is logged in Salesforce, every activity can be tied to a call, adding key reporting capabilities they didn't have before.

Campaign Monitor uses ring groups to categorize agents by attributes, such as skills and languages. Previously, agents placed a caller on hold while manually searching for an available agent. Now, with Talkdesk's simple call-transfer capabilities, agents are able to quickly transfer a caller to another ring group, ensuring a smooth transition between teams and a seamless experience for callers.

The teams also leverage Talkdesk for Slack for alerts about key contact center events, such as incoming calls and recent voicemails. With Talkdesk for Slack, entire teams are notified and can quickly act on these important events. Campaign Monitor also uses email alerts for notifying agents with individual lines. "The alerts we've set up with Talkdesk have provided us with a powerful productivity tool," says Visvanathan.

> # "We plan on putting every new company we acquire on Talkdesk."
>
> **– VIVEK VISVANATHAN, DIRECTOR OF GO-TO-MARKET OPERATIONS**
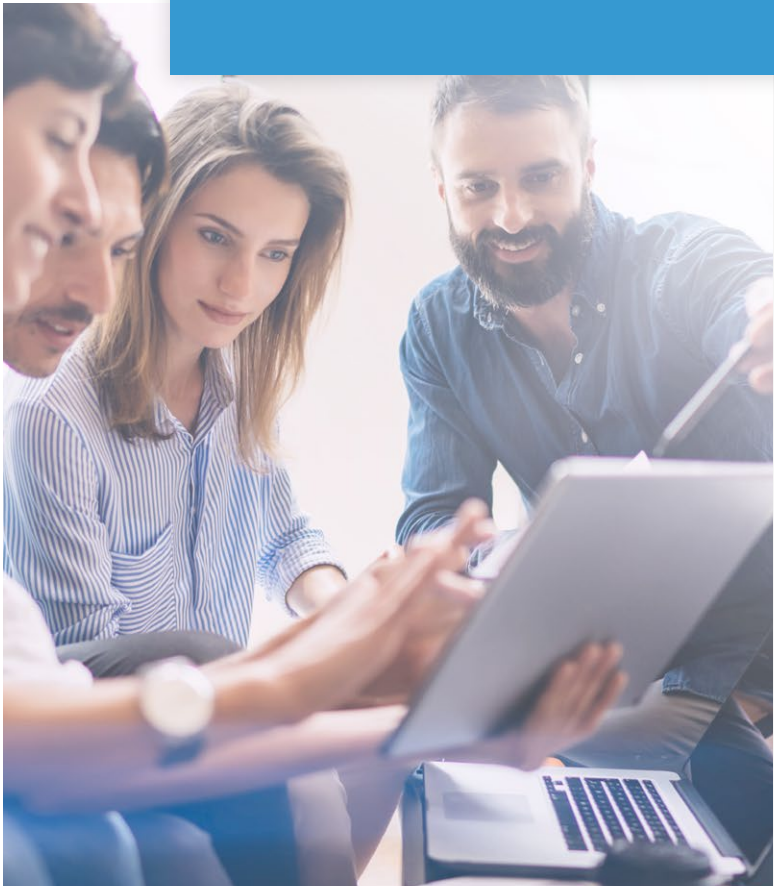
Streamlining Rapid Growth

Campaign Monitor is part of CM Group, a family of marketing technology brands that is growing rapidly, including the recent acquisitions of two new brands. "We plan on putting every new company we acquire on Talkdesk," said Visvanathan. Even with their rapid growth, training new employees on Talkdesk is simple and takes only a few minutes to get them up and running. Visvanathan looks forward to leveraging his partnership with Talkdesk to grow the business and take Campaign Monitor's customer experience to the next level.

talkdesk