



Salesforce-Juxto Integration Services Enables a Canadian University Improve Real-time Communication

CASE STUDY

Customer: A Canadian University

Size: 11-50 employees

Location: Fredericton, New Brunswick

Industry: Education

Profile: The university offers practitioner-oriented masters, bachelors and diploma programs leading to professional careers.

Services: CRM Integration Services

Business Need

The Canadian University provides challenging academic content delivered by faculty members who are professionally engaged in their respective fields of knowledge, possess the appropriate credentials, and are committed to excellence in teaching. Programs are offered online and on-campus and are designed for students who have a desire to fast-track their education or need to balance work and/or family commitments.

The University's tremendous growth had led to a need to engage and communicate effectively with students across the nation. For ongoing communication and engagement efforts, the University uses Salesforce CRM as their customer engagement solution. In addition to the use of Salesforce CRM, the University also leverages cloud-based real-time communication and collaboration solution Kandy UC from Ribbon Communications and Juxto.com.

The University was suffering from a disconnect between their phone system and their Salesforce system. Admission representatives had to enter details from calls manually into Salesforce, introducing errors and missed data. They wanted to move from their existing hosted phone platform to a solution that was much more capable of meeting the growing needs of the business.

To overcome these challenges, the University was looking to move their telephony into the cloud to get away from the on-premise solution and overcome challenges of mobility, scalability, and getting things done in quick turnaround. The client, therefore, wanted to integrate the Salesforce CRM solution and the Kandy UC telephony solution

to enable a seamless communication experience to staff and students.

Given Synoptek's long-standing integration experience in Salesforce technology and its strategic partnership with Juxto, the University reached out to Synoptek as part of a 5-year contract.

Solution and Approach

To meet the University's integration requirement, Synoptek provided a robust team from its Business Systems and Application group.

The team planned to implement a fully integrated solution - not just for the initial development, but for ongoing support as well.

Synoptek proposed and delivered a fully integrated solution pulling together the Salesforce CRM application and the KANDY UC APIs to create a more seamless plug-in solution for the customer engagement. Synoptek leveraged the University's existing Telephony system to provide a "soft" phone right inside Salesforce.

We built a nationwide private network for their data and real time communication needs and implemented Kandy Contact Center as well as a Synoptek Salesforce real-time communication application.

As part of the integration, Synoptek enabled the following key features for the University:

- User Profile Settings and Administrative configuration capabilities to allow for self-management
- Click to Dial and Screen Pop to allow for seamless user interaction and customer engagement
- Call History indicating Caller Name, Date, Time, and Duration, Notes, and links to call audio recordings

- Inbound Call Integration with Salesforce popups tying in the ability to answer, hold, transfer, and conference calls
- Outbound Call Integration with Salesforce popups, including click to dial, call history, and review

Going forward, the client plans to further capitalize on Synoptek's capabilities to add more features across Salesforce integration as well as look into Microsoft Teams integration for tech and student advisement staff as well as for introducing visual attendance to allow people to better reach out to the University staff.

Business Results

With Synoptek's Salesforce-Juxto integration, the University has been able to improve the efficiency of their telephony system.

The Kandy implementation enables them to easily spin up phones in any location, on any device, and any place whenever they need them.

The client is able to make the most of a pay-as-you-use model; they are able to leverage features and capabilities on demand and meet growing telephony requirements, making it easy to plan scaling into the future. The plug and play solution overcomes the challenge of being tied to licenses or worrying about the cost and complexity of hardware replacements.

Post-integration, the University staff can focus on their core business than worrying about the driving unified communication. They can manage calls, automatically collect data into Salesforce, and recall vital information based on the incoming caller ID.

The new integrated solution allows admission representatives to make calls to students seamlessly while enjoying an array of features across user profile settings, click to call, presence and information, call log reporting and recording, and inbound and outbound call integration.

They can leverage features like call transferring, group conferencing, and call history management.

Students and faculty can enjoy high levels of mobility, without being tethered to a desk. Synoptek's implementation, they have the option to choose from a hard phone, soft phone, mobility clients on their mobile apps, and leverage intelligent routing to receive phone calls wherever they are.

About Synoptek

Synoptek is a global systems integrator and managed IT services provider, offering comprehensive IT management and consultancy services to organizations worldwide. The company works in partnership with clients of all sizes – from mid-market to Fortune 100, and for over two decades, its focus has been to provide maximum business value to its clients, by enabling them to grow their businesses, manage risk and compliance, and increase their competitive position. Synoptek is committed to delivering improved business results and unmatched service to every client, every time.



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