

CASE STUDY



IMPROVING CUSTOMER EXPERIENCE WITH SERVICE CLOUD VOICE x RINGCENTRAL INTEGRATION

Industry: B2B MSP

Solution: Salesforce Service Cloud Voice x RingCentral

Challenge

The client faced recurring issues with missed customer calls and a lack of visibility into customer interactions. Calls were not automatically logged in Salesforce, leaving service teams without a complete record tied to cases or contacts. This resulted in delays in issue resolution, inconsistent customer experiences, and limited reporting on call volumes, agent performance, and customer engagement.



Objectives

The primary objective was to implement a telephony system which can be access within Salesforce and to ensure every customer call was captured and linked directly to Salesforce records. The solution needed to eliminate missed calls, enable automatic call logging against cases and contacts, and provide supervisors with better visibility into call metrics and agent productivity. Another key goal was to enhance the customer experience through faster response times and a more seamless service process.

Solution

We implemented Salesforce Service Cloud Voice and integrated it with RingCentral, enabling agents to make and receive calls directly within the Salesforce console. The integration ensured that all inbound and outbound calls were automatically logged against the correct case or contact, capturing call details and recordings in real-time. Intelligent routing was introduced to reduce missed calls by directing customers to the right agent or team. Dashboards and reports were configured to provide supervisors with full visibility into call volumes, response times, and agent performance.

Results

- Significant reduction in missed customer calls through intelligent routing
- Complete visibility of customer interactions with automatic call logging in Salesforce
- Faster case resolution due to real-time access to call history and recordings
- Improved customer experience through streamlined communication and reduced delays
- Enhanced reporting and analytics for better resource planning and performance tracking