

CLOUDCONNECT *integration with* HUBSPOT CRM

Integration with CloudConnect Contact Center solution and HubSpot CRM system offers numerous benefits for streamlining communication processes, enhancing customer interactions, and improving overall efficiency. Here are some features and advantages of CTI integration with CloudConnect solution and HubSpot CRM:

Features and Benefits:

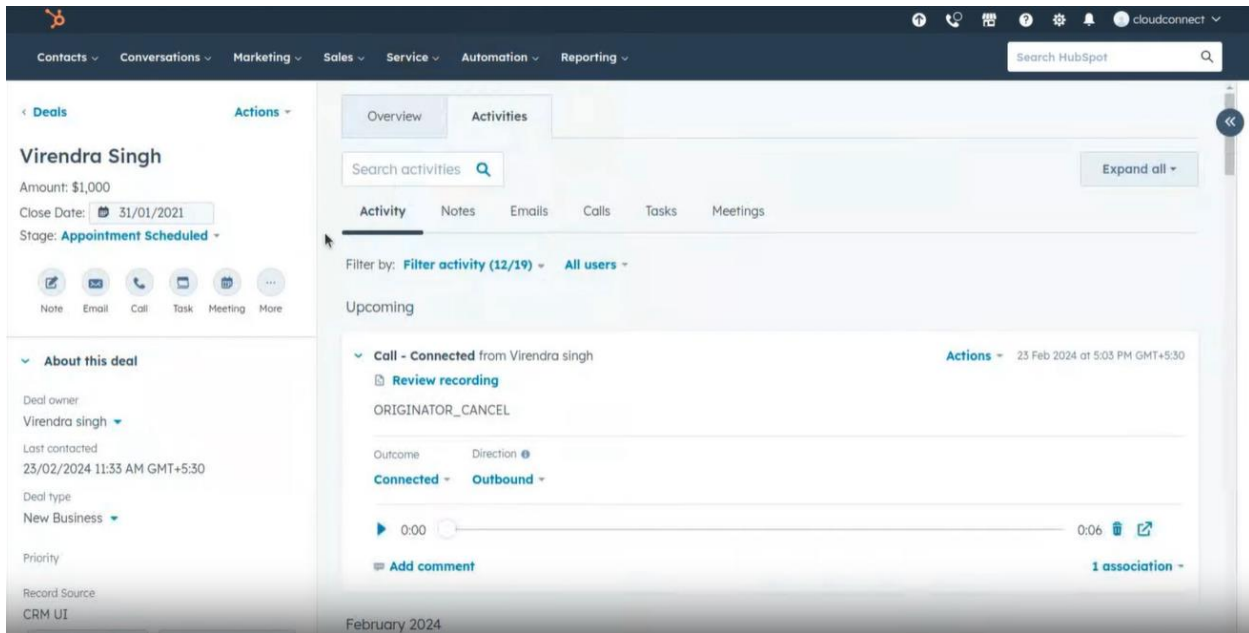
- **Caller Identification:** CTI integration enables automatic caller identification by retrieving customer information from the CRM system. When a call comes in, agents can instantly see the caller's details and previous interactions, allowing for personalized service.
- **Screen Pops:** CTI integration triggers screen pops on agents' screens when calls are received. These screen pops can display relevant customer information, such as name, contact history, purchase history, providing agents with context before they even answer the call.
- **Click-to-Call:** With CTI integration, agents can initiate calls directly from within the CRM system by simply clicking on a phone number. This eliminates the need for manual dialing, saving time and reducing errors.
- **Call Logging and Activity Tracking:** CTI integration allows for automatic call logging and activity tracking within the CRM system. Call details, including call duration, outcome, notes, & call recordings can be logged directly into the customer's record, providing a comprehensive history of interactions.
- **Real-time Reporting and Analytics:** Integration between our CloudConnect contact center and CRM system enables real-time reporting and analytics on call metrics, agent performance, and customer trends.

Basic Requirements:

1. HubSpot CRM administrator account access.
2. HubSpot plan to support telephony integration
3. Valid subscription of CloudConnect Solutions, write to us directly on marketing@cloud-connect.in and get yourself registered.

Once you have an active CloudConnect and HubSpot CRM account, you may follow the below steps to get started:

User view on the Deal page of the HubSpot CRM:

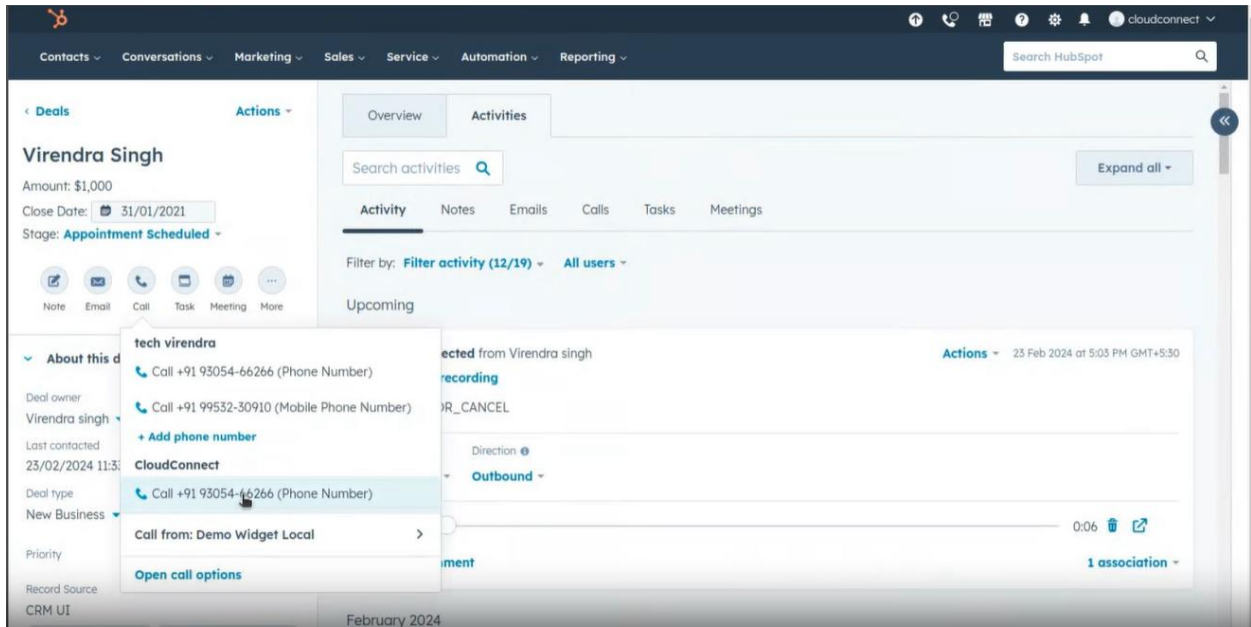


The screenshot displays the HubSpot CRM interface for a deal named "Virendra Singh". The deal amount is \$1,000, and the close date is 31/01/2021. The deal stage is "Appointment Scheduled". The deal owner is Virendra Singh, and the last contacted date is 23/02/2024 at 11:33 AM GMT+5:30. The deal type is "New Business".

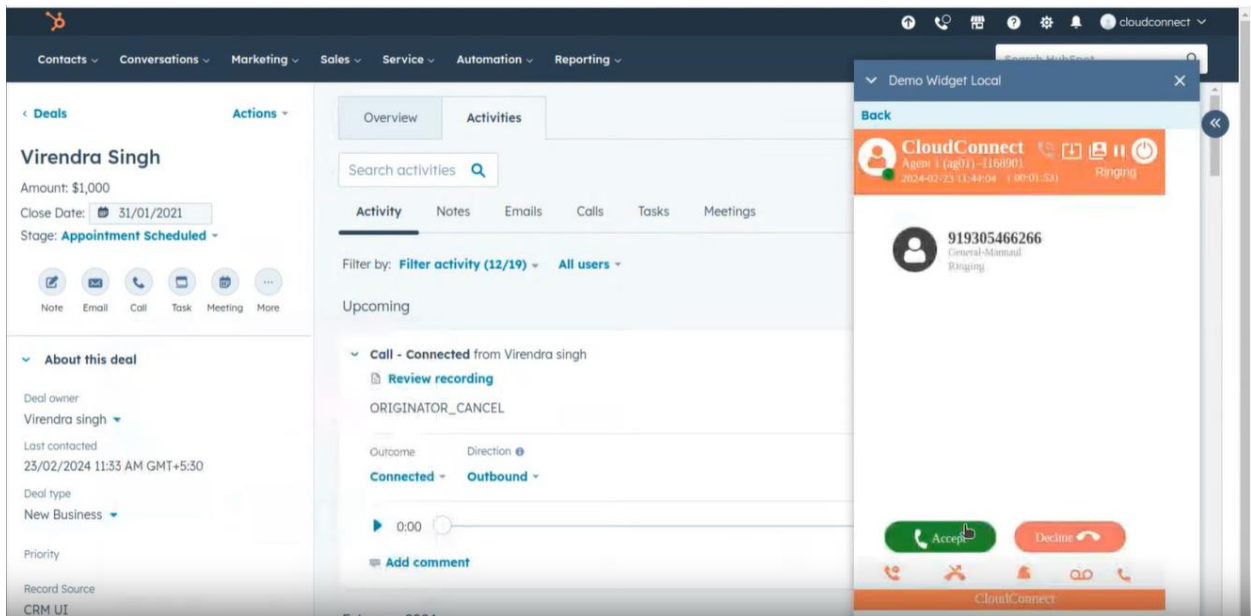
The main view shows the "Activities" tab, which is filtered by "Filter activity (12/19)" and "All users". The activity list shows an upcoming call: "Call - Connected from Virendra Singh" on 23 Feb 2024 at 5:03 PM GMT+5:30. The call outcome is "Connected" and the direction is "Outbound". The call duration is 0:06. There is a "Review recording" link and an "Add comment" button. The call has 1 association.

The bottom of the screen shows the date "February 2024".

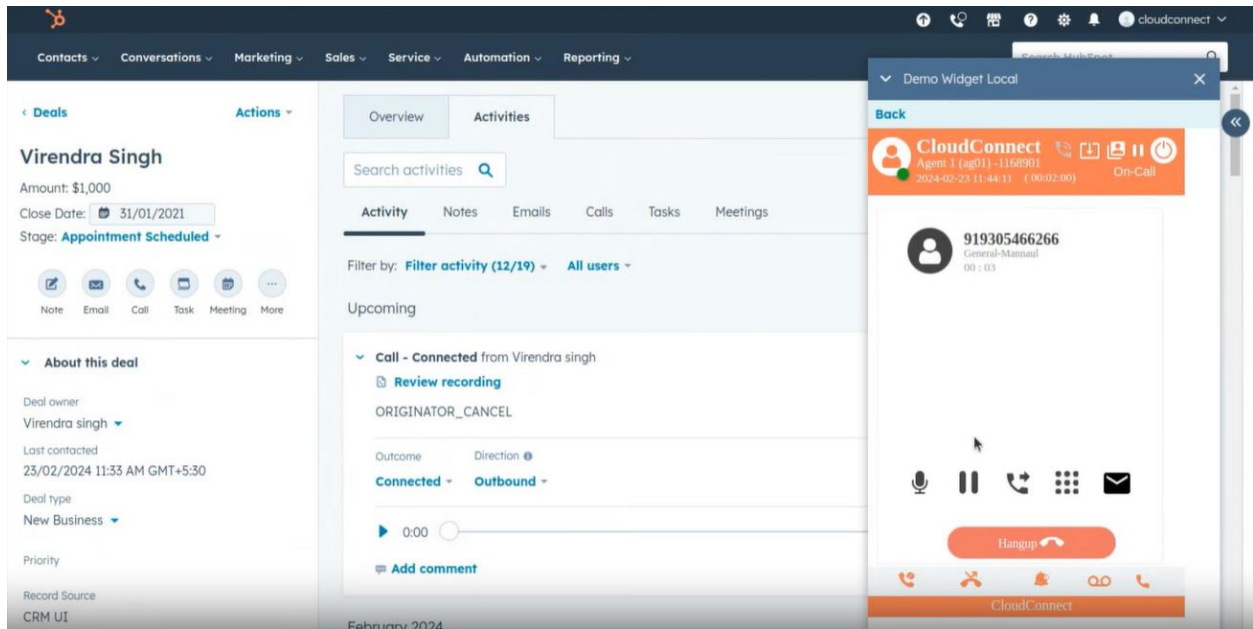
User selecting an option to call from the HubSpot CRM.



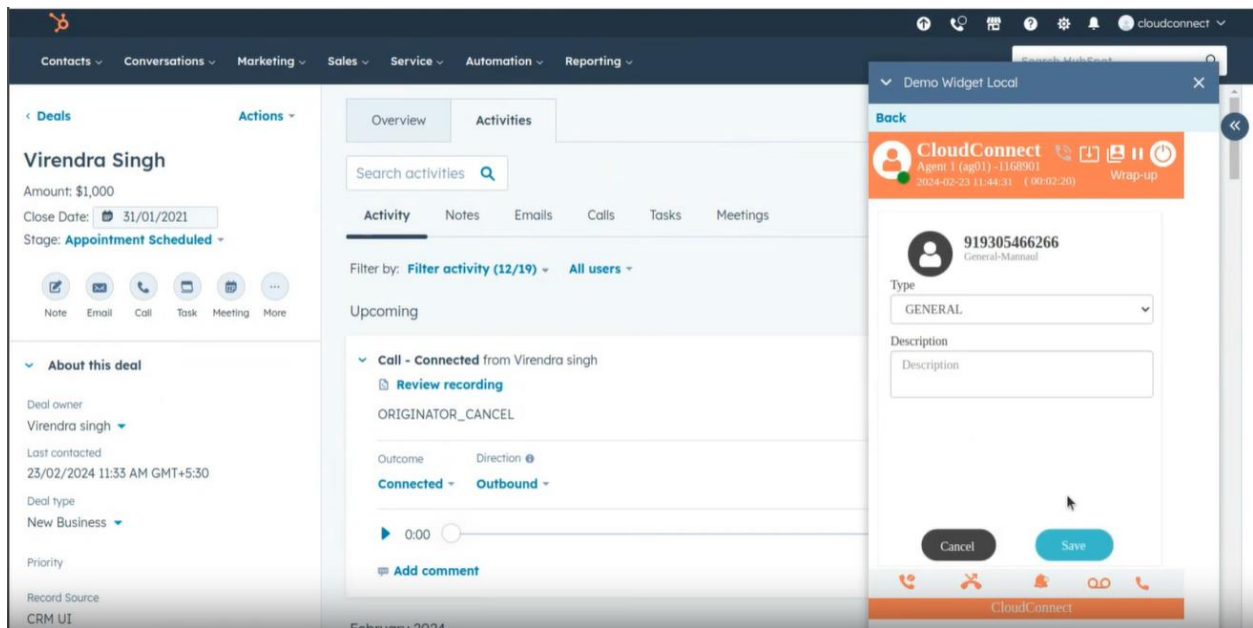
Once call is initiated, CloudConnect dialer opens on the screen



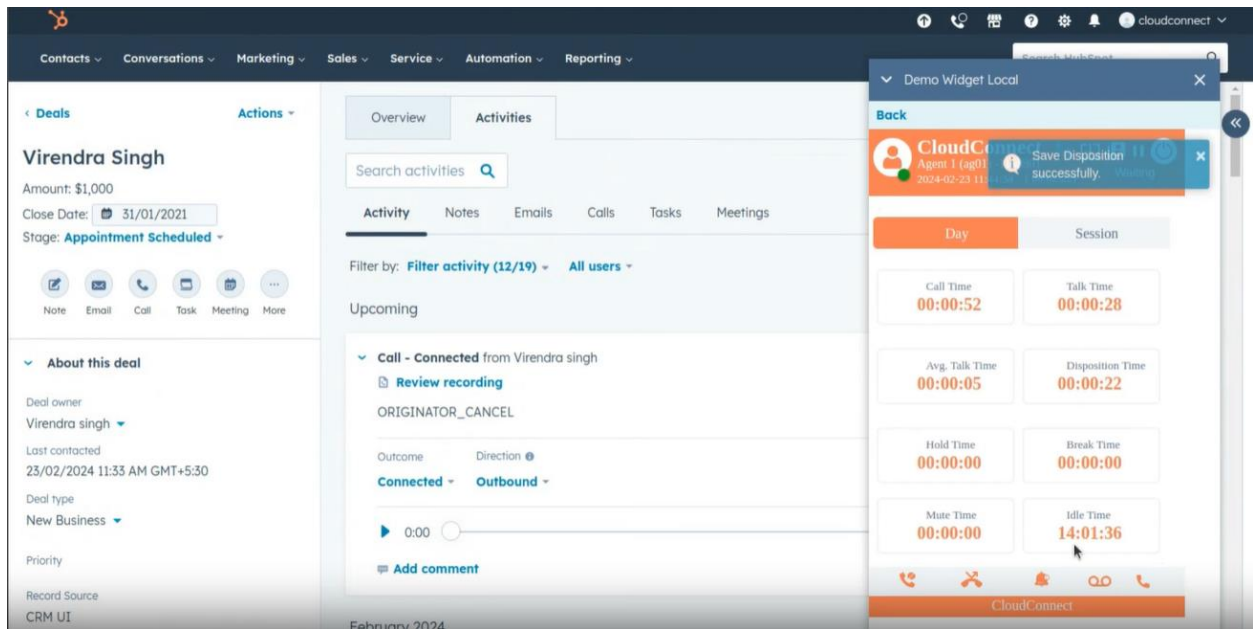
This shows connected call with other call control options



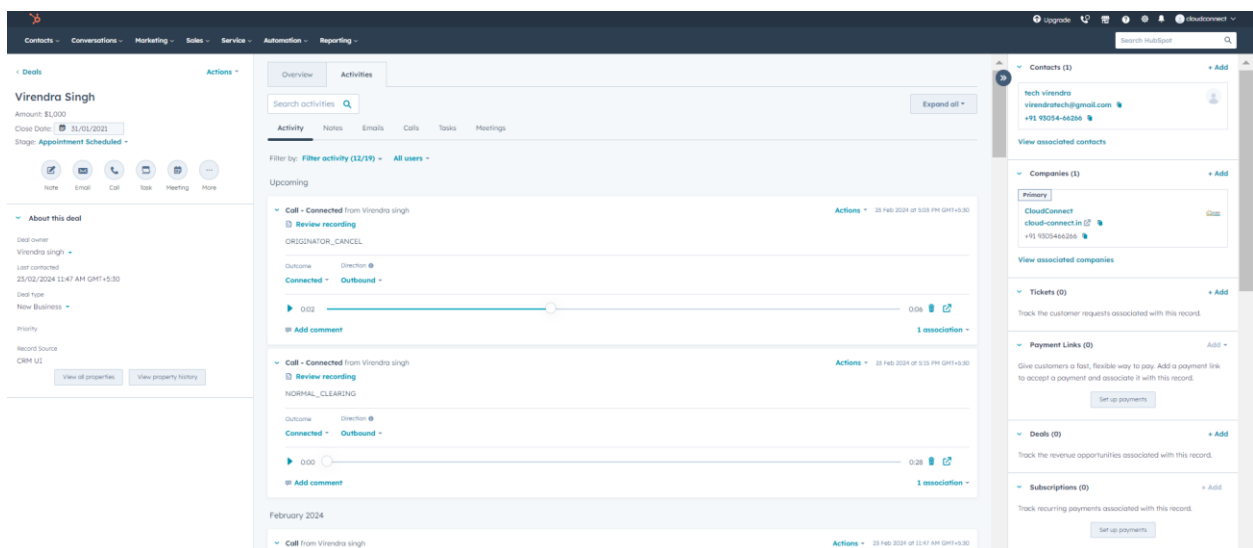
User has an option to choose predefined Disposition & add remarks



The dialer captures the details & displays on this app dashboard



This will have the call details & the call recordings.



Note: This integration currently offers solution for outbound calls only.

