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.

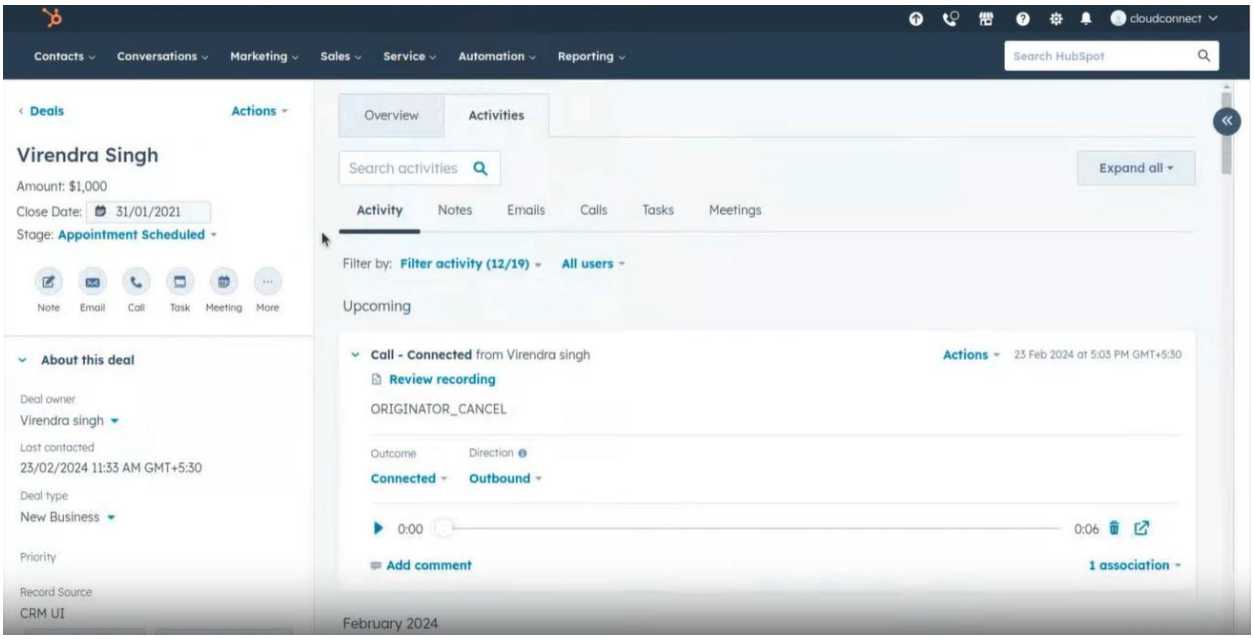
- Real-time Reporting and Analytics: Integration between our CloudConnect contact center and CRM system enables real-time reporting and analytics on call metrics, agent performance, and customer trends.

Basic Requirements:

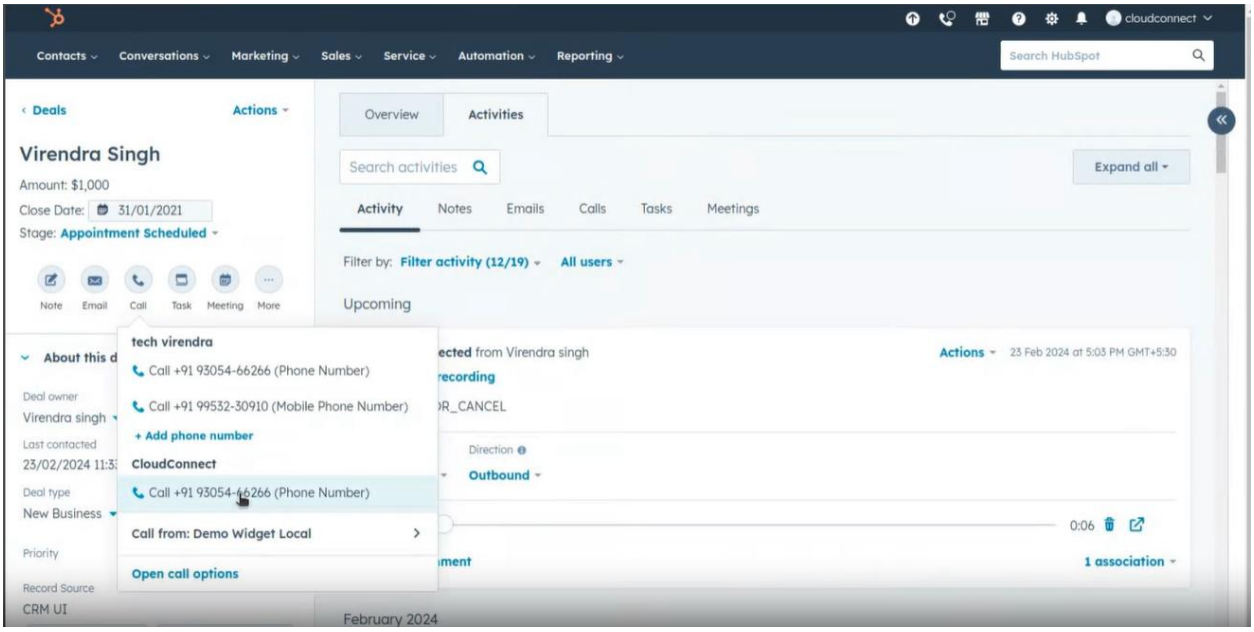
1. HubSpot CRM administrator account access.
2. HubSpot plan to support telephony integration
3. Valid subscription of CloudConnect Solutions, write to us directly on marketing@cloud-connect.in and get yourself registered.

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

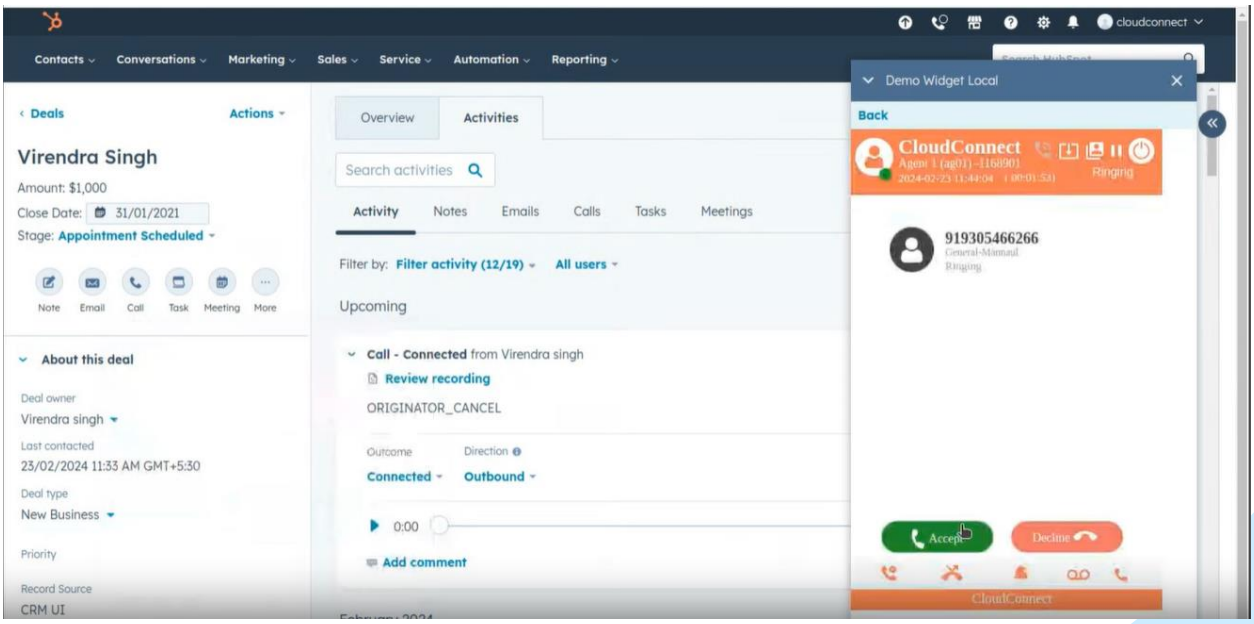
User view on the Deal page of the HubSpot CRM:



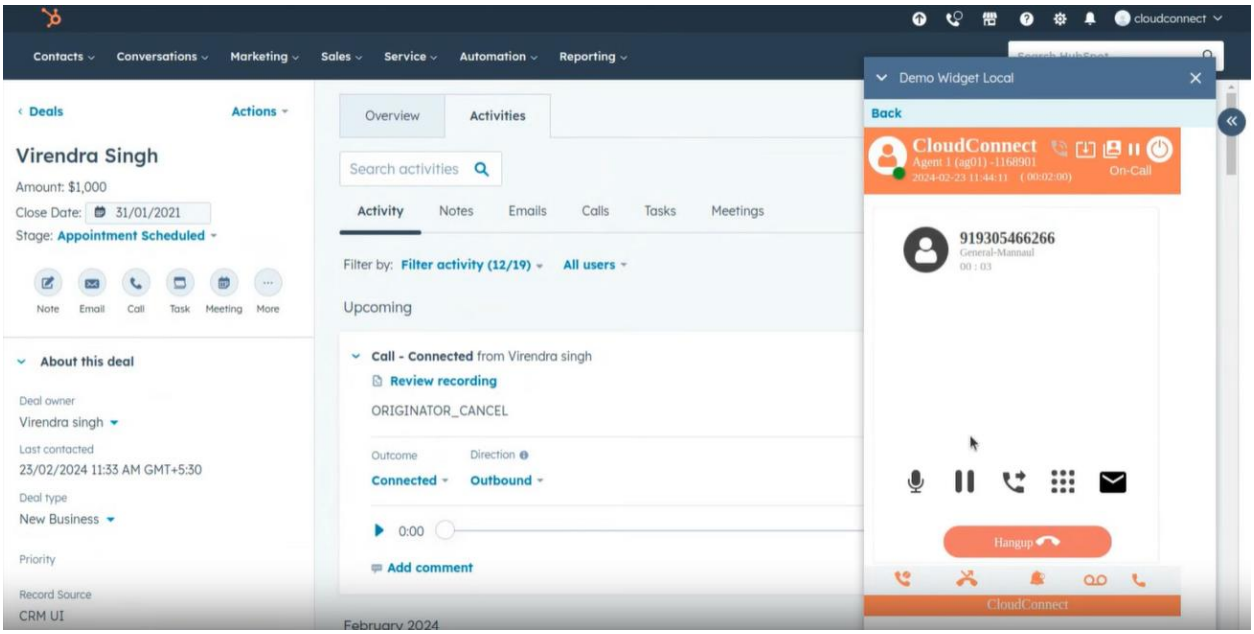
User selecting an option to call from the HubSpot CRM.



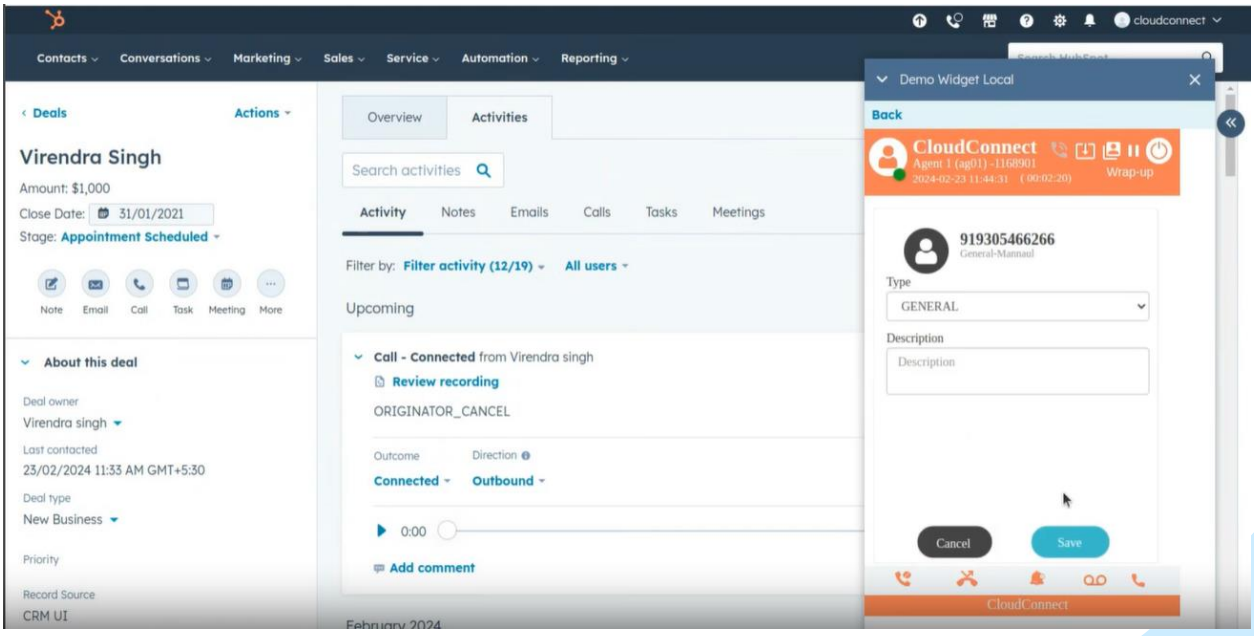
Once call is initiated, CloudConnect dialer opens on the screen



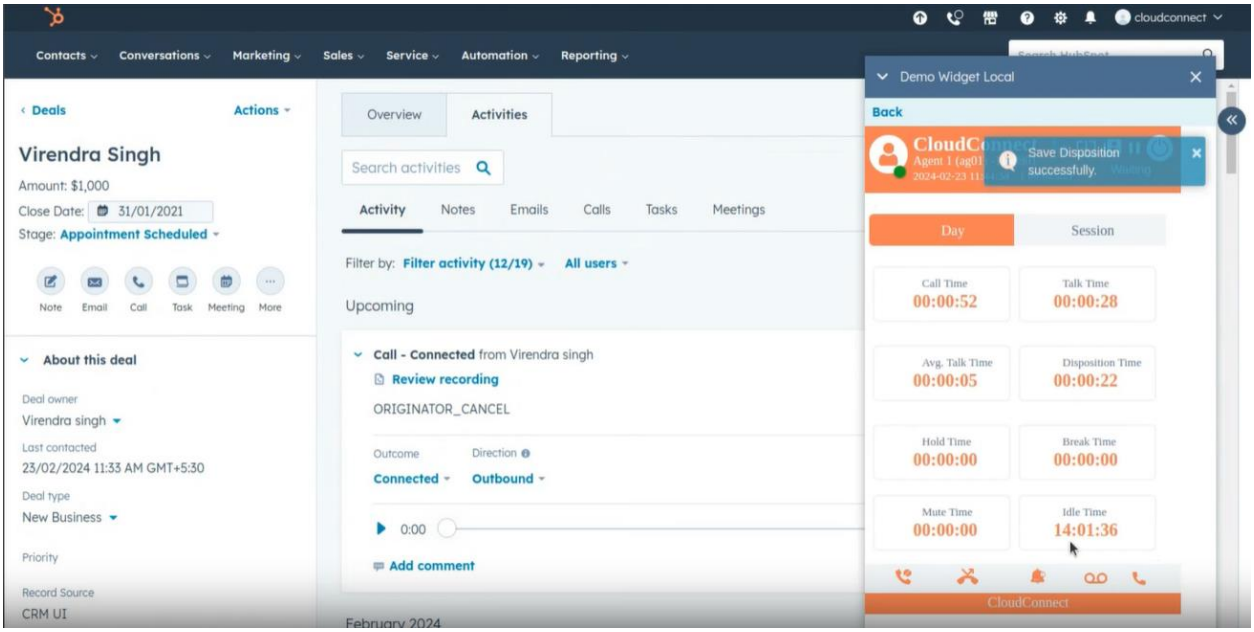
This shows connected call with other call control options



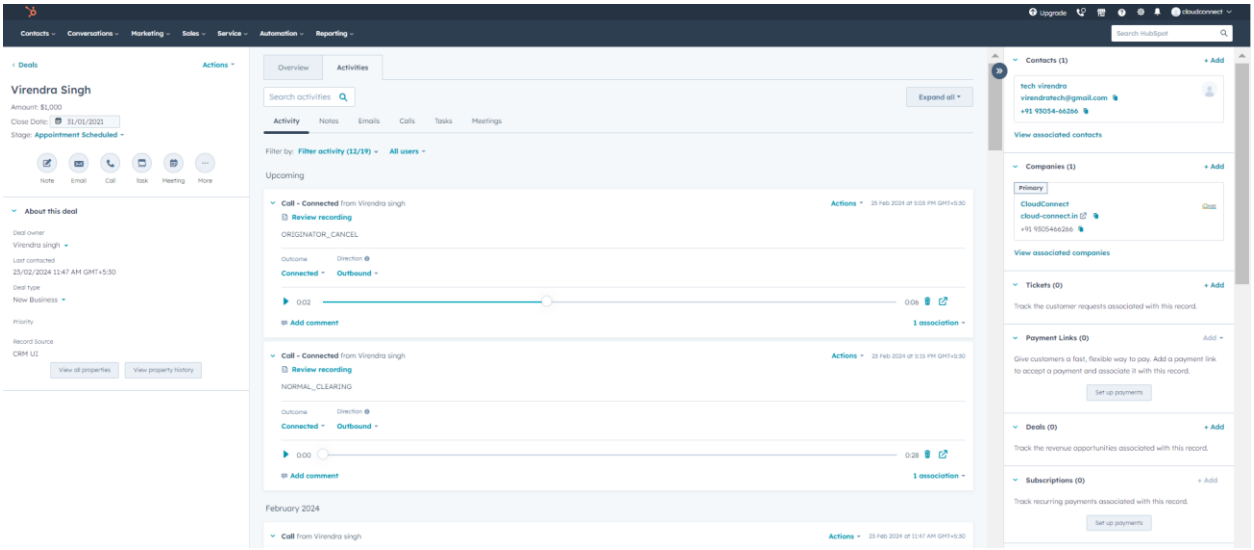
User has an option to choose predefined Disposition & add remarks



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.

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