

# BUILDING A HIGH PERFORMANCE CONTACT CENTER WITH BROADSOFT

## CC-ONE SALESFORCE EDITION

### Websites:

[www.loyal3.com](http://www.loyal3.com)

### BroadSoft Products

BroadSoft CC-One Salesforce Edition

### The impact

- Streamlined customer experience that connects inbound calls with the appropriate agent, the first time
- Moved control of the customer service process totally into the hands of Broker Dealer Operations
- Customer service representatives have the information they need at their fingertips, and no longer waste cycles manually creating cases, asking customers for identifying data and digging through the CRM to find customer information

LOYAL3 makes it easy and affordable for everyone to invest in the companies that they know and love. LOYAL3 offers a highly scalable social technology platform that makes stock ownership easy and affordable for a new class of individual investors. LOYAL3's Social Stock Plan enables people to buy stock in their favorite companies in three steps, with as little as \$10 and no fees. LOYAL3 also offers the Social IPO™, a platform that opens up IPO access to people on a first-come, first-served basis, making IPO stock available at the same price and time as Wall Street. With its Stock Rewards™ product, LOYAL3 enables companies to use their stock for brand-positive promotions to increase acquisition, engagement and loyalty. LOYAL3 generates revenue from companies by helping them raise capital, attract low-cost individual shareholders and create a deeper level of brand engagement.

LOYAL3 moves fast and its contact center has had to proactively evolve to keep up with demand. After two short years, LOYAL3 realized it needed to optimize the performance of its contact center by:

- Adding voice to their Salesforce implementation
- Becoming an agile contact center
- Scaling with the business

## CUSTOMER CASE STUDY

**"With CC-One, the customer experience now rests exclusively on us. All that we need to worry about is training quality customer service representatives that can deliver top-notch service. The rest is taken care of."**

— Katrina Peck, VP Broker Dealer Operations

"By training, we are financial services people, that is our bread and butter", said Katrina Peck, VP of Broker Dealer Operations at LOYAL3. "As our organization grew over time, we realized that we needed a customer service program that could be as fast-paced as we are which prompted us to begin exploring different options".

### Adding Voice to Salesforce

When LOYAL3 engaged with BroadSoft, it had implemented the Salesforce Service Cloud as its second CRM system. LOYAL3's headquarters-based customer service representatives were communicating with its customers using Salesforce chat and email. Inbound voice calls were first directed to an outsourced call center which handled general questions and then manually transferred the majority of callers, including existing account holders, to LOYAL3's headquarters for additional service. This was not an efficient process, and added a time-consuming step to the customer experience. With CC-One, LOYAL3 could integrate voice communications with the Salesforce email and chat, and streamline everything within the Salesforce application.

### Becoming an Agile Contact Center

As with the financial market itself, inbound customer interaction at LOYAL3 is vulnerable to external influences. On a typical day, customer service representatives may need to field less than 50 calls, mostly from prospective customers seeking to learn about the service — or existing clients calling to make minor changes to their accounts. However, when a hot company is making its Initial Public Offering (IPO), the number of inbound inquiries can skyrocket into the thousands, drastically increasing the pressure and need for efficiency for customer service representatives.

**"As we grew, we realized that we need absolute control. We need to be able to decide when the phones open, when they close, what the voice mail sounds like. When I have the CEO saying 'open up', I need to be able to do that."**

— Katrina Peck, VP Broker Dealer Operations

With call volumes that are prone to dramatic fluctuation on any given day, LOYAL3 knew it needed to streamline operations to save time and improve the customer experience, take ownership over the complete customer service process, and remove restraints that got in the way of adjusting operations on-demand. Therefore, LOYAL3 sought to integrate a contact center solution that would accomplish three goals:

1. Maximize agent productivity for the optimum customer experience
2. Give control to the business: Broker-Dealer Operations
3. Provide real-time visibility into call center operations at all times

### Maximizing Agent Productivity for the Optimum Customer Experience

At LOYAL3, a customer service representative's role extends beyond troubleshooting and answering basic questions. It also requires they wear the hat of financial broker. This means not only responding to inbound queries and helping customers understand their accounts, but also delivering back-office services like fulfilling account transfers, corporate actions, and dividends — a whole suite of specialized tasks of a full-service broker-dealer.

Agents must balance fulfilling these services with interacting with customers via multiple channels, which on a high-volume day can include a mix of thousands of inbound chats, several hundred emails — on top of several thousand phone calls.

When a call comes in, CC-One uses the caller's phone number to check the Salesforce database for account information and routes the call accordingly. For example, existing account holders get priority, routing directly to staff at headquarters, while others go to the general call center for education and basic information.

Once the call has been routed to the appropriate destination, agents are presented with the caller's Salesforce record via **Agent Screen Pop**, which instantly offers insight into the customer's identity, history and intent.

"Whether the customer knows it or not, we are getting to the meat of why they called us in the first place much sooner. This means a better customer experience."

CC-One automatically creates a case record in Salesforce for that call and logs whatever information it can from the call. During time-sensitive periods of high call volume, like an IPO, these features save the customer service representatives' valuable time, and enable customers to be serviced quicker and more efficiently.

**"Now our customer service representatives can just focus on answering our customers' questions and not digging through multiple places for information."**

— Katrina Peck, VP Broker Dealer Operations

### Give Control to the Business: Broker-Dealer Operations

Prior to CC-One, the outsourced call center, which first received inbound calls, had control over logistical details like hours of operation and call routing within the organization. This approach became cumbersome as their business grew and they needed variable hours and call routing strategies based on the demands of their dynamic business.

"As we grew, we realized the need for absolute control," continued Peck. "We need to be able to decide when the phones open, when they close, what the voicemail sounds like. When I have the CEO saying 'open up', I need to be able to do that."

By integrating the BroadSoft CC-One Salesforce Edition, LOYAL3 is able to manage and administer all of its call center operations from within Salesforce. Call routing strategies are easily created and modified by Broker-Dealer Operations. Hours of operation, priority caller handling and overflow call routing when demand increases are in complete control of the business from within the CRM system. In the future when they are handling multiple IPOs at the same time, they will be able to easily set up different queues and route calls to specialized teams.

"With CC-One, the customer experience now rests exclusively on us. All that we need to worry about is training quality customer service representatives that can deliver top-notch service. The rest is taken care of."

### Providing Real-Time Visibility into Call Center Operations

CC-One Salesforce Edition provides Broker Dealer Operations with a graphical dashboard within Salesforce that details everything that is going on in the contact center at any given moment. Managers can monitor the calls coming into each queue and tell how many customer service representatives are available, on the phone, idle, or wrapping up calls. They can also see what kinds of cases are being logged and if calls fail. With this visibility, real-time decisions can be made to optimize operations and the customer experience.

### Scaling with the Business

As an organization that's continuing to grow, it was important for LOYAL3 to select a solution that would be able to evolve with the needs of the business. This means continuing to scale and handle the needs of a growing customer-base, and having the flexibility to unlock and utilize new features as they make sense for the program.

As a small business with expanding international needs, LOYAL3 has the peace of mind of knowing that when the time comes to expand their capabilities, they have the ability to do so seamlessly, without halting existing operations.

**"I know that if my CEO says 'we're going to open an office in the United Kingdom tomorrow' I wouldn't have to go out and buy a new system. We're comfortable knowing that CC-One is a system that we're able to grow with, and that we're able to do that only when we need to."**

— Katrina Peck, VP Broker Dealer Operations

### About LOYAL3

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[www.broadsoft.com](http://www.broadsoft.com)

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#### About BroadSoft

BroadSoft is the leading provider of cloud software and services that enable mobile, fixed-line and cable service providers to offer Unified Communications over their Internet Protocol networks. The Company's core communications platform enables the delivery of a range of enterprise and consumer calling, messaging and collaboration communication services, including private branch exchanges, video calling, text messaging and converged mobile and fixed-line services.