



CANON FINANCIAL SERVICES, INC.

## Canon Financial Finds Contact Canvas Enhances Omni-Channel Supervisor for a True Blended Agent Experience

### OVERVIEW

*Why AMC Technology?*

#### INDUSTRY

Retail

#### COMPANY PROFILE

Canon Financial Services, Inc. (CFS) is a wholly owned subsidiary of Canon U.S.A., Inc. founded in 1979 to support the sale of Canon products by providing lease financing solutions to Canon customers.

#### GOALS

Their main objective was to have truly blended agents and to replace their legacy system in order to handle case management and email routing.

#### SOLUTION

Integrating Salesforce and Avaya using Contact Canvas so contact center managers can manage agent channel assignments based on contact center volume.

#### BENEFITS

Increase in agent efficiency, decreased average call handling and call disposition times as well as training time needed for agents.

## CASE STUDY

### Canon Financial + Contact Canvas

When Canon Financial made the decision to focus on their contact center, they looked to Salesforce Service Cloud to replace their legacy system because it wasn't designed to do case management or email routing. But the most important feature Canon Financial wanted was a way to have truly blended agents. "Resources needed to be able to dynamically handle channels - phone, email and chat," said Michael Kea, IT Sr. Manager at Canon Financial. "We wanted managers to have visibility of the channels agents were handling and also be able to control the channels and agents. If phone volume was low but emails were stacked up, we wanted an easy way to move resources in and out of the channel queues. They can do that with AMC's integration using Salesforce's Omni-Channel Supervisor." His group selected AMC as their CTI partner after Kea's team evaluated competing products, and worked with AMC to implement Contact Canvas to integrate Salesforce and Avaya.

"With the other solutions, we needed two different tools: one for email and chat and another for the phone. We would have lost the ability to handle all of the channels and blend them. With Omni-Channel Supervisor and Contact Canvas, managers can move agents from phone to email, email to phone, or to both channels. They can flip agents in and out of each channel! This [Omni-Channel Supervisor] is a Salesforce feature that was enhanced by AMC. The two products worked so well it was like  $1 + 1 = 3$  instead of 2. The agents love it!" shared Kea.

Canon Financial Services, Inc., a wholly-owned subsidiary of Canon USA, has a largely inbound customer service group handling inbound phone calls and emails. Agents also do follow up work and some outbound calling. There is a collections group that is responsible for collecting on accounts and they use outbound dialing to reach out to customers.

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IT Senior Manager, Canon Financial



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## AMC TECHNOLOGY, LLC.

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Going into the selection process Canon didn't have a lot of telephony experience in house. They didn't have CTI with their previous system; but they knew that when agents were in Salesforce interacting with customers they did not want to spend a lot of time looking for the right customer record. "The main reason we selected AMC was their consultative approach. They provided a lot of information about Salesforce, contact center and the industry. Sales didn't just try to sell the product, they educated us also and explained the different solutions," continued Kea. "The omni-channel integration from a feature stand point and the single user interface for all channels were the biggest differentiators because none of the other products had that." Canon relied heavily on AMC's integration expertise and "AMC stuck with us - they over delivered," stated Kea.

Canon Financial is in the process of preparing their agents to handle chat and are scheduled to roll out later this year. This preparation of agents has proven to be the "special sauce" for success for Canon.

When asked what advice he had for anyone looking for an omni-channel solution, Kea said "We are learning a lot as we monitor usage of the solution. In advance, give your agents time to pilot the interactions. In an omni-channel world, where you have the agent handling multiple channels, you have varying things happening at different times. Agents can be working an email and a call comes in. We created a good pilot environment early based on AMC's recommendations. We did focus groups with our agents, created test queues on the phone side and simulated the calls coming in and tuned our routing and rules as appropriate. Trying it out, not just turning it on is key. Conduct some agent focus groups and TEST and not testing like does it work, pilot and give them [agents] time."

The biggest benefit Canon Financial has seen is decreased call handling time because their agents aren't spending time identifying the caller and looking up the relevant information. AMC searches by automated number identification (ANI) but Canon also receives the call attached data (CAD) to make routing decisions, and to pass CAD to agents. Canon has also reduced the amount of time it takes to disposition the call. Prior to implementing Contact Canvas, agents had to go into a different system to handle this task, but it can now be done in a single user interface.

"Out of all of the features, agents like screen pop the best. The user interface is easy and simple. The training was a snap. Agents intuitively picked it up. They like that it's a one stop shop and they get all their work items in one interface so they don't have to look in multiple places," said Kea.

## ABOUT AMC TECHNOLOGY

AMC Technology is a global leader in contact center and CRM integration with a vision for improving the customer experience through increased agent efficiency and personalization capabilities. With over 23 years of experience, AMC Technology leads the market in providing contact center integration expertise and best practices. AMC powers contact centers and customer interactions for companies around the globe through its certified platform – Contact Canvas™ and unparalleled expertise. AMC products are certified by technology partners and allows businesses to more effectively manage all types of customer relationships while delivering superior levels of customer service and improving productivity.