



Smooth CRM and CTI Integration that Customers Remember

OVERVIEW

Why AMC Technology?

INDUSTRY

Investment

COMPANY PROFILE

Putnam Investments provides investment services across a range of equity, fixed income, absolute return and alternative strategies. The global asset manager and retirement plan provider distributes those services largely through intermediaries via its offices and strategic alliances in North America, Europe and Asia. Headquartered in Boston Massachusetts, Putnam employs over 200 employees in seven countries.

GOALS

Quickly synchronize Putnam's new CTI platform with their CRM under a tight deadline

SOLUTION

Using AMC Technology's Contact Canvas™ to integrate Salesforce (CRM) and Cisco (CTI)

BENEFITS

By using AMC Technology's Contact Canvas™ for Salesforce and Cisco integration, employees were able to save time with an integration that worked correctly and filled their call center needs.

CASE STUDY

Putnam Investments + Contact Canvas

Integrating customer relationship management systems (CRM) with computer telephony systems (CTI) can often be an involved task for call centers due to the specific needs of each platform. When Putnam Investments switched their platforms, they found this out directly. Because Putnam had worked with AMC Technology previously, when the difficulties arose, they contacted AMC.

Putnam purchased Contact Canvas™ for integration between Salesforce (CRM) and Aspect (CTI). However, due to vendor consolidation, Putnam partnered with a competitive CTI integration provider when they switched their CTI platform to Cisco.

Putnam quickly discovered the process of integrating the two platforms was going to be a challenge. Requirement discussions were difficult, they continued to experience issues within production that didn't appear during testing, but had to continue operating an active call center in parallel.

With a tight deadline and lowered credibility for the company, Putnam IT managers reconnected with AMC Technology to discuss integrating with Contact Canvas instead. A representative from Putnam recalls by stating "The product install was easy and it just worked."

Within a week, Putnam's agents were back to work, successfully running AMC Technology's Contact Canvas integration software effectively connecting Salesforce with Cisco.

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- Putnam Financial



“Support in answering questions and squeezing us into a very aggressive schedule was refreshing.”

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SOLUTION

AMC Technology’s Contact Canvas™ not only provided a solution to the issues, but gave the agents new features such as:

- ✓ Flexibility - click-to-dial, Contact Canvas™ dial pad and the Cisco phone options
- ✓ Options - ability to transfer using a consultative call or one-step transfer, hold and conference with multiple parties.
- ✓ Security - adding login customizations on passwords and extensions

BENEFITS

With Contact Canvas™ integration for Salesforce and Cisco, Putnam’s employees were able to save time because the product worked correctly and filled their call center needs. Customers were able to receive their answers swiftly and agents did not have to hassle with incongruent systems.

“AMC’s support in answering questions and squeezing us into a very aggressive schedule was refreshing. The product worked as well as we’d hoped and the business is once again happy,” stated Putnam’s Senior IT Manager.

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.

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