



# Why It's Time to Integrate UCaaS & CCaaS

*Integrations are key components of customer  
experience transformation projects and deliver  
measurable success*

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## Executive Summary

A key competitive differentiator for companies is delivering stellar customer experience (CX). Not surprisingly, technology plays a huge role in achieving success. That's one reason nearly 60% of companies will have a formal CX transformation project underway by the end of 2021. They're using technology to fundamentally change customer interactions.

One component of these CX transformation projects is to make *all employees*—not just customer service representatives—responsible for customer success. Imagine having the expertise of the entire company available with a few mouse clicks during any customer interaction. From a technology perspective, organizations must integrate their Unified Communications and Collaboration (UC) platform(s) with the contact center or customer service platform.

Though this integration can happen in an on-premises environment, it's more likely to happen with cloud-based services. What's more, the agility of cloud services makes it easier to add and grow agent seats.

As of late 2020, 44% of companies have already integrated UC and contact center, with another 32% planning to do so by year's end. Of those integrating the two platforms, 62% of those use the same provider. They are finding compelling benefits, including:

- Using collaboration apps internally for customer service reps and supervisors
- Integrating agents (customer service or sales reps) with other employees to collaborate on projects or key customers
- Extending access to collaboration apps to customers
- Bringing in non-agent experts from across the organization to address customer issues

In addition to the functional benefits, organizations also are seeing measurable improvements in business success. For example, those who have integrated the two platforms have documented a 53% increase in revenue, a 6% decrease in operational costs, and a 35% increase in customer satisfaction scores.

## Transforming the Customer Experience

Customer satisfaction is the top business priority, according to our *Customer Engagement Transformation: 2020-21 Research Study* of 700 IT and CX leaders. It topped product/service quality, information security, revenue generation, and more as the top priority. So it's no surprise that so many organizations are transforming their customer experience.

As Figure 1 shows, 26.1% of companies have a CX transformation initiative underway, and another 32.7% plan to implement one by the end of 2021. Our research success group is transforming CX at an even higher rate: 37.6% and 35%, respectively. (We asked research participants if they measured before-and-after changes, following an advanced CX project, in revenue, operational costs, customer ratings, and service/sales rep productivity. The success group includes those who have measured changes in any or all of these metrics, and also are in the top half of the resulting success percentages.)

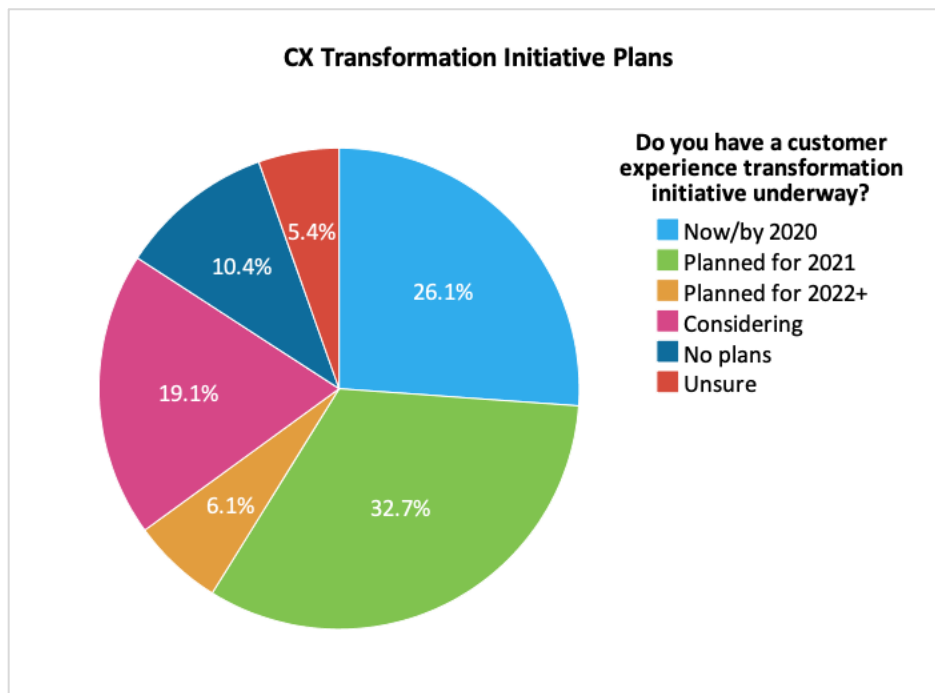


Figure 1: CX Transformation Initiative Plans

## Expanding the Reach of Customer Service

One initiative commonly included in CX transformation projects is making all employees—not just the customer service or sales representatives—responsible for customer success. Often, customer service representatives may not have an answer to a detailed question. For example, a service rep at a mortgage company may not have the expertise to answer a crucial set of questions from a prospective customer applying for a large commercial mortgage. By conferencing in a commercial mortgage expert in real-time, the rep can address the customer's questions on the spot and push the application to the next stage.

The technology decision that enables this capability is the integration of Unified Communications and Collaboration (UC) and contact center or customer service platforms. (For the purposes of clarity, we will refer to customer service and sales platforms as “contact center,” even though organizations don’t need to have a physical center handling these calls. Particularly in the era of remote workers, organizations must supply employees with customer service apps, communications, and integrations.)

## Integration Plans

By the end of 2020, 62.9% of companies plan to have their UC and contact center platforms integrated, with another 13.4% planning to do so by 2021. Those in the Nemertes success group are 27% more likely to integrate the two platforms than those not in the success group.

Though UC/contact center integration can happen using any architecture, we find more integrations when both platforms are in the cloud, and it’s easiest with a common platform or tight integration managed by a single provider. Among those using CCaaS, 59.3% have integrated with UC, while only 34% of on-premises providers have done so. Among those already integrated, 61.9% use the same provider.

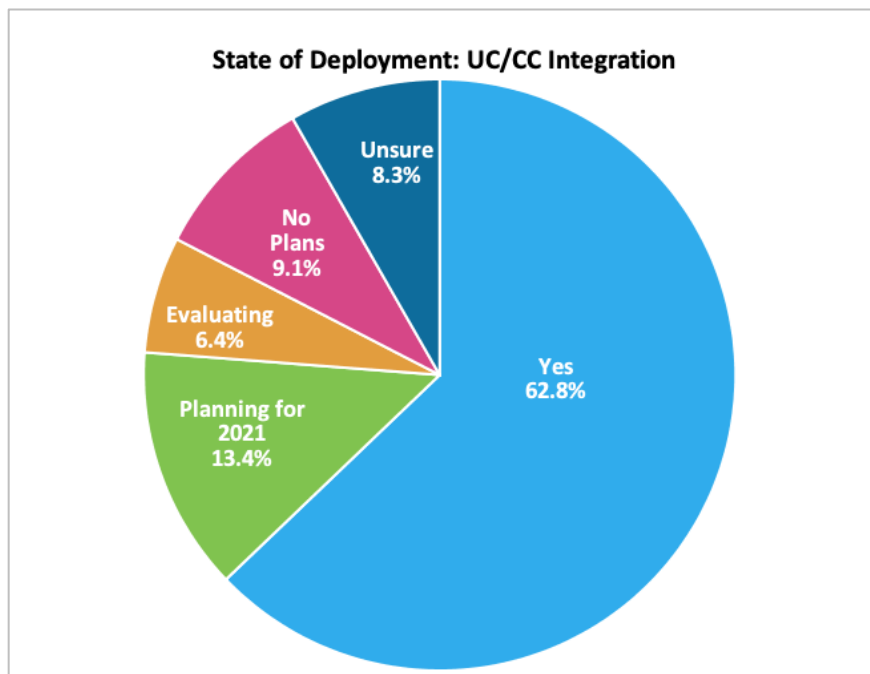


Figure 2: UC/Contact Center Integration

## The Value of Using Cloud

Though UC and contact centers can be integrated with on-premises or cloud-based platforms, organizations are significantly more likely to do so in the cloud. Among those who have completed integrations, 66.2% use cloud contact center platforms and 33.8% are on-premises.

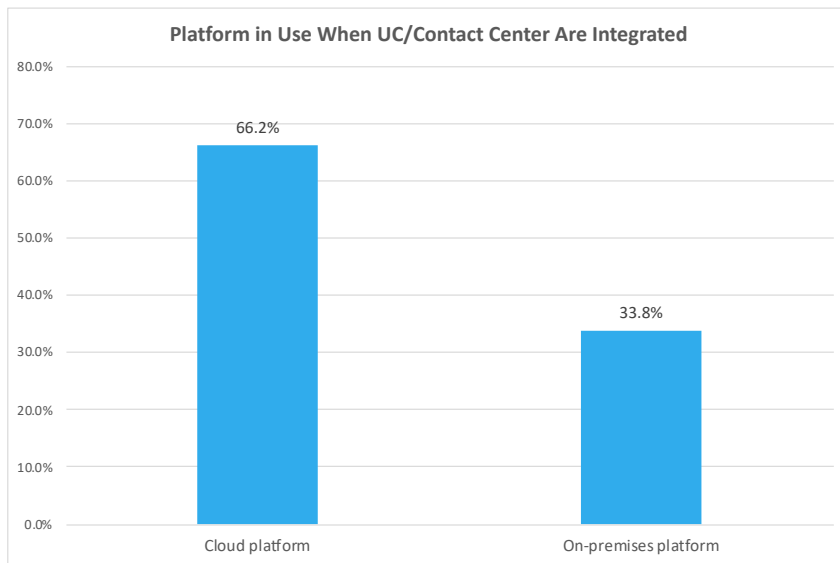


Figure 3: Platform in Use When UC, Contact Center Are Integrated

Though the value of cloud extends to organizations of all sizes, it's become a game-changer for small and midsize contact centers. Many of them didn't have resources or the customer demand to build a traditional "contact center," with rows and rows of cubicles and an on-premises contact center that likely was too big and costly for their needs.

Now these organizations have options. They can simply start by adding a few seats at an affordable price—and grow as needed. In addition, cloud services make it easier to add digital channels (webchat, SMS, video, mobile business chat, etc.), which customers are demanding now. Rather than having to spin up an internal server, test, and manage each of these channels, companies can easily buy them from cloud providers and have them up and running immediately. Those with cloud services have an average of 7.1 channels, compared to 5.7 for those on-premises.

### Reasons to Consider Using a Single Provider

By using the same provider, IT and CX leaders say they see several benefits, including the following:

- Common user interface across all CX, communications, and collaboration applications, reducing the amount of training required
- Increased adoption of applications because of the seamless integration
- Decreased IT operational costs because there is no need to train and certify across multiple vendors
- Easier to manage and secure

### Overall Benefits of Integration

As Figure 4 illustrates, organizations report several benefits resulting from the integration of UC and contact center platforms and extending customer care to any employee. Overall, integration helps to resolve an age-old problem: Contact centers historically have operated as a silo in the organization, with separate technology and little interaction with the rest of the company.

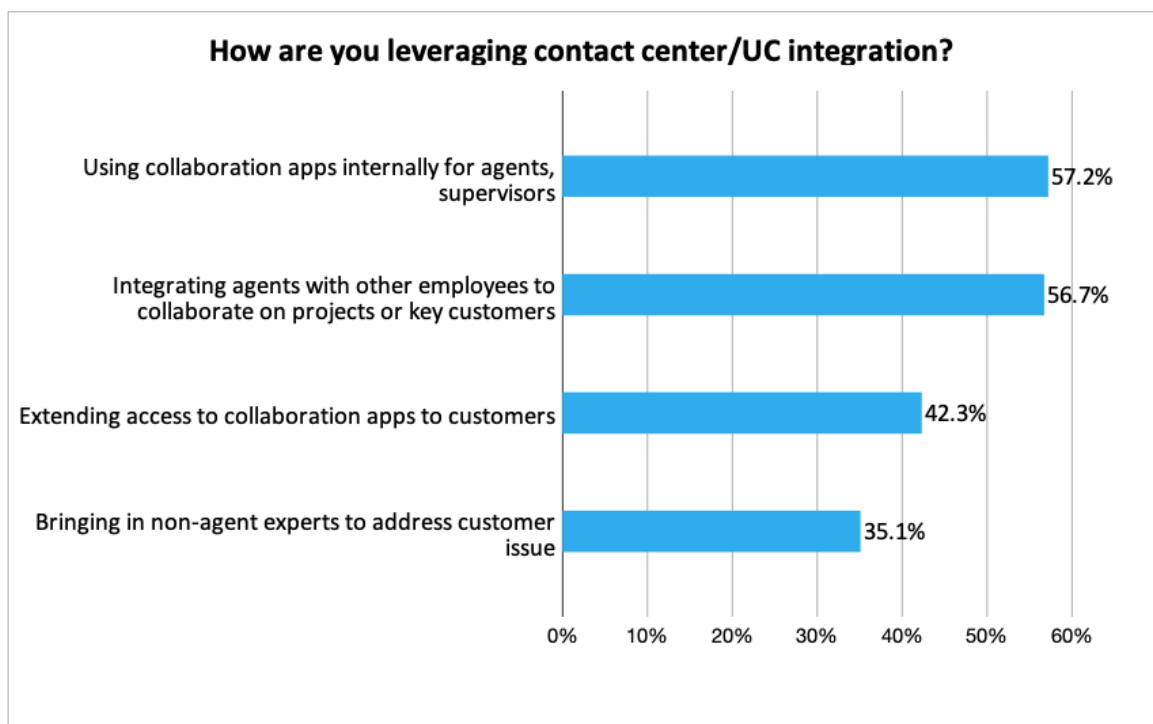


Figure 4: How are you leveraging contact center/UC integration?

With the integration, 57.2% of companies are now using the same company-wide collaboration apps (meetings, team collaboration, voice/telephony) for agents and supervisors. For example, they can use team workspaces to discuss and track agent performance metrics and plans for improvement.

Nearly the same percentage of companies (56.7%) have integrated agents (sales or customer service reps in the contact center or using the apps available from the platform) with other employees to collaborate on projects or key customers. For example, agents can participate in sales and marketing strategy calls to align with an upcoming campaign. Or, sales teams already collaborating in a team workspace on a key customer can bring in contact center supervisors to provide input on recent interactions.

Another 42.3% of organizations are extending access to collaboration applications to their customers. For example, one investment company allows high-net-worth clients to access their account teams' presence status, team workspaces, and other methods of communications and collaboration.

Though it's often the most common example of why integration should happen, only 35.1% of organizations are bringing in non-agent experts to address customer issues. Based on interviews with CX leaders, we expect this to increase moving forward, as organizations develop policies and processes for agents to reach out to other employees for customer interactions.

## Metrics for Success

Those that integrate UC and contact center have documented measurable success. When calculating before-and-after success of advanced CX initiatives (i.e., AI, analytics, automation, etc.) revenue increases 52.8% when organizations also have integrated UC and contact center, vs. 43.8% for those who have not integrated. Additionally, agent efficiency improves more when organizations integrate the two platforms, 31.1% vs. 22.3% without integration. We also found that companies saw operational costs decrease by 6.0% and customer satisfaction scores increase by 34.5% when integrating UC and the contact center.

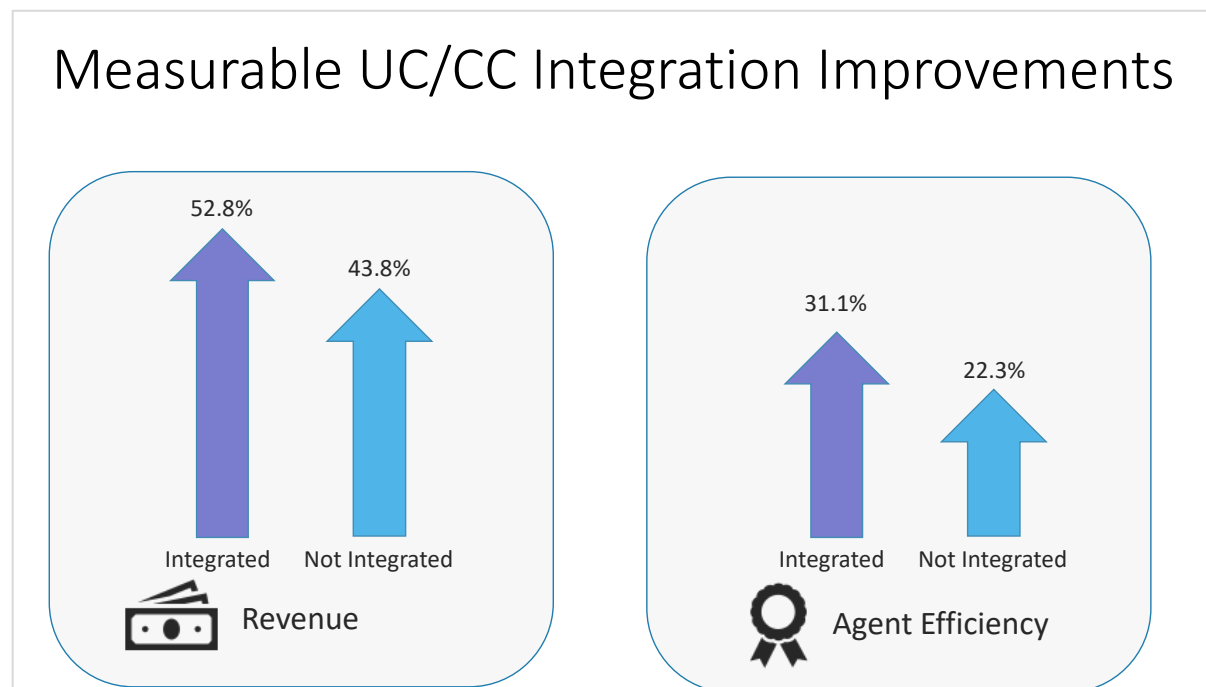


Figure 5: Measurable UC/CC Integration Improvements

Some of the success metrics are higher when organizations use the same provider. For example, those using the same provider show a 54.1% revenue increase, vs. 25.7% for those not using the same provider. For customer satisfaction ratings, those using the same provider show a 36.9% improvement, compared to 29.4% with different providers.



## Conclusion

Most organizations have CX transformation projects underway or are planning for them. As part of those initiatives, they are integrating their UC and contact center platforms. We recommend the following:

- If you haven't started a customer transformation initiative, lead the effort in your organization to get one started. If not, you'll be at a competitive disadvantage
- As part of the transformation project, integrate your UC and contact center platforms to extend the ability to serve customers to all employees
- Evaluate cloud platforms, which are more agile and allow organizations to start small and grow as demand grows, while also making it easier to add digital channels
- Consider using a single provider, which delivers better success metrics and provides a consistent user interface.

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ABOUT METRIGY: Metrigy is an innovative research firm focusing on the rapidly changing areas of Unified Communications & Collaboration (UCC), digital workplace, digital transformation, and Customer Experience (CX)/contact center—along with several related technologies. Metrigy delivers strategic guidance and informative content, backed by primary research metrics and analysis, for technology providers and enterprise organizations.