Enhancing Customer Engagement Through Innovative Integration: Einstein Conversation Insights (ECI) with Salesforce and RingCentral

Client Background

In the modern world of customer service and sales, there is a trend where companies look at deploying new technologies with the intent to coach their sales team better and to improve sales. This case study discusses the implementation of Einstein Conversation Insights (ECI) by a leading company, DMI, within Salesforce with media provider RingCentral in order to inform sales strategy, team performance, and more.

Services we provided

Saleforce   Hubspot   Marketo

Problem Statement

DMI wanted to use advanced technology to drive efficiencies in the sales team through voice and video call analytics. However, the integration of ECI with Salesforce and RingCentral as a media provider was a bit challenging for the company. DMI was in need of a system with the capability to:

- Analyze the call volume and engagement of the sales team and their contacts.
- Uncover some of the significant interaction metrics such as the number of questions, share of time talking, and keywords used.
- Provide detailed insights into sales coaching activities and fine-tune customer engagement approaches.
- Though ECI was advantageous, its shortcoming of the insufficiency of documentation, and the incompatibility of media formats with ECI, posed a problem for integration.

Objectives

DMI set three main objectives to overcome the described challenges:

- Integrate ECI with Salesforce so that it would be possible to analyze voice calls, providing detailed insights that customers received.
- Use RingCentral as the Media Provider: As the call recordings and data would be generated by RingCentral, it would be in a good position to integrate with Salesforce and ECI.
- Custom Salesforce Analytics Studio Dashboard: Provide certain metrics that were unavailable out of the box and which served to meet the unique requirements of DMI.

Solution

Below are the steps taken during the integration process to ensure that the stated objectives are met:

RingCentral Integration:

- **Developer Account and API Credentials**: Create a developer account with RingCentral and get API credentials to access call data and recordings.
- **RingCentral Application:** Create an application to acquire the needed API credentials for easy integration into Salesforce.
- **Data Fetching:** Develop a RingCentral API, through which the implementation would be done to fetch the recordings and data of calls for more analysis using ECI.

Salesforce and ECI Integration

- Created a Connected App on Salesforce to receive API credentials to do the voice call analysis and to integrate with ECI.
- **ECI Enablement:** Enabled ECI on Salesforce and created an object CallCoachingMediaProvider to accept the call recordings.
- **Custom Application Development:** Designed and developed an application in Node.js to automatically fetch and process the voice call recordings of RingCentral. This meant converting monophonic recordings into a stereophonic format for compatibility with ECI.

Challenges Overcome

One of the biggest challenges was the lack of documentation regarding the integration of ECI into external media providers. DMI belonged to the first 100 buyers of ECI, which required custom solutions when fetching call data and recordings.

Another major challenge was that ECI is only capable of processing stereophonic call recordings, while RingCentral offered only monophonic recordings. The development team designed a custom code integration to convert monophonic recordings into a stereophonic format, allowing ECI to analyze the data fully for coaching purposes.

Result

The integrated innovation provided DMI with in-depth insights on sales coaching, allowing the client to:

- **Frequency of Ask:** Analyze who is asking more or fewer questions during calls to help coach around sales techniques.
- **Talk Time Analysis:** Understand how much time is being spent talking and by whom, to measure engagement levels between sellers and their clients.
- **Keyword Identification:** Identify top keywords of the best sales performers to coach and refine strategy.

Conclusion

The integration of Einstein Conversation Insights (ECI) into Salesforce through the media provider RingCentral is a substantial leap in the field of customer interaction and sales coaching analytics. Despite limited documentation and incompatibilities with media forms, DMI built a strong system providing useful insights to their sales process. This integration's success was the beginning of breakthrough advanced technologies that would revolutionize sales coaching and customer engagement, thereby setting a new standard for innovative solutions in this domain.