Approaches to CRM Integration

Developer Technical Note

Introduction

This developer technical note describes approaches and considerations for integrating WebEx meeting services with mainstream CRM and Helpdesk applications such as those offered by Siebel, RightNow, Remedy, SupportForce.com, and others. Enabling a CRM application with WebEx services and meeting management enables the Customer Support Representative (CSR) to not only discuss the customer's problem, but proactively engage them in an on-line meeting, invite subject matter experts to participate, and remotely access and troubleshoot the customer's computer and application.

This technical note focuses on integrations of CRM and Helpdesk applications with the WebEx Support Center and the associated SMARTech application for remote system access. WebEx currently offers integration kits for integrating WebEx Support Center with Remedy and SupportForce.com. Contact your WebEx Client Service Manager for more information on these kits.

Scenario

The standard scenario for an integrated workflow with a CRM application and Support Center is as follows:

- A CSR is handling a call with a customer. They are logged into their CRM application with a trouble ticket page open.

- The trouble ticket page has fields of information about the customer on the call: name, company, e-mail address, phone number, problem description, severity level, etc.

- The trouble ticket page also has a custom button or link to launch a WebEx Support Center session.

- The CSR decides to escalate the customer interaction by launching a Support Center session, and pushes the button to start the session.

- A Support Center session launches in a separate browser window. The CSR then invites the customer to join the meeting using the Support Center menu item to "Invite Attendee". The CSR merely copies and pastes the customer's e-mail address into the invitation dialog box, and an invitation e-mail is immediately sent to the customer.

- The customer clicks on the Join Session link in the e-mail invitation, and is connected to the session.

- The CSR can then share documents with the customer, or the customer can share their desktop with the CSR. The CSR can also invite a technical domain expert to the session in progress to better trouble-shoot the customer's problem.

- The CSR can also invoke the WebEx SMARTech application to gain access to any computer in the customer's environment to access applications, review or modify system configurations, etc.

This type of convenient integration with Support Center greatly reduces turn-around time for the call, eliminates multiple back-and-forth interactions with the customer, increases CSR productivity, and improves customer satisfaction.

Technical Approach

Most CRM applications offer ways of customizing the user interface and workflow. Typical customizations include the addition of custom fields, action buttons, and web links. Data contained in standard fields and custom fields is usually accessible through a variable mechanism based on the field's name or ID and special delimiters. For example, the customer's e-mail address might be referenced with a variable such as "$cust_email$".

Basic Integration

The most straightforward manner to launch a WebEx Support Center on-line session from the CRM UI is to create a custom action button or web link and place it on the help ticket screen. The definition of the action invokes a web browser with a URL that calls the Support Center URL API to launch the session. A browser window opens and the support session is started. From this point, the CSR can use the Support Center user interface to invite the customer to join the session.

The example below illustrates a URL definition that launches a web browser and starts a support session. This example uses "$" to delimit the variables USER and PASSWORD. "c:\progra~1\intern~1\iexplore.exe" https://SITENAME.webex.com/SITE-NAME/p.php?AT=LI&WID=$USER$&PW=$PASSWORD$!&BU=http://www.webex.com/customercare&MU=http://SITENAME.webex.com/SITENAME/m.php?AT=SS%26BU=http://www.webex.com/customercare

Notes:
- The WebEx Login command (AT=LI) is the first part of the URL action to make sure the CSR is logged in, and the command to start the session (AT=SS) is chained to the Login command with the MU parameter.

- The URL specified in the BU ("BackURL") arguments defines where to go in the event the Login or Start Session commands fail for some reason (in this case, it goes to customer care on the public WebEx site). You can set the back URL to whatever makes sense in your environment. Refer to the WebEx URL API reference documentation for more information on back URLs.

- The URL can use secure HTTPS to provide security around the user's password, and should be issued as an HTTPS "POST".

- Some systems encrypt user passwords in proprietary ways. In this case, a separate WebEx password must be defined and managed in the CRM system and accessed with a custom variable (such as $WEBEX_PSWD$).

Deeper Integration

There are additional integration features possible besides simply launching a support session. Some things you may want to consider include the following:

- Supporting Single Sign-On (SSO) behavior with automated WebEx user creation. Refer to the technical note Approaches to Single Sign-On for a discussion of approaches to this problem.

- Capturing support session data (such as date, time, customer, etc.) for inclusion in an activity history for reporting and reviewing purposes.

These scenarios require more advanced logic and workflow that a typical web-based action link can handle. The suggested approach is to develop a stand-alone application that is hosted on your network that can handle higher level requests and perform sequences of WebEx API calls to accomplish the task. The CRM web-based action link would then target this application, and pass parameters to it for inclusion in subsequent API calls. This application can then support the more advanced approaches to SSO, for example.

Consider capturing support session data. One approach is for the stand-alone application to time-stamp the request to start a support session, and associate the customer ID with a session record. This information can be pushed back into the CRM system through its API or other mechanism. Then the actual support session can be launched as above using the WebEx API AT=SS command. In this case, the duration of the session is not captured.

Another approach would be to use WebEx's session history command in the XML API to obtain a historical listing of support sessions, attendees, time and duration, etc. This approach has the benefit of providing comprehensive information, including attendees that are invited on-the-fly (such as a subject matter expert). Refer to the XML commands lstSupportSessionHistory and lstSupportAttendeeHistory in the XML API reference documentation in the chapter covering the History Service. This information typically takes 24-36 hours to become available. A typical solution to this time-lag is to construct a cron job that runs nightly to query the session history and update the CRM database. Running these commands with WebEx site administrator credentials will provide support session histories across all customer service representatives. The cron job can then organize the data by CSR, and update the CRM database appropriately.

Integrating Other WebEx Services

While the integration approaches discussed above focused on WebEx Support Center, most CRM systems can also benefit from integration with other WebEx services.

- Connect WebEx Sales Center with the sales automation workflow of a CRM, including instant meetings, scheduled meetings, and meeting history reporting.

- Connect WebEx Training Center with the customer training features of a CRM.

- Connect WebEx Event Center to the marketing campaigns functionality of a CRM.

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