

CUSTOMER STORY

talkdesk | PowerDMS

User Case
Support, Sales

Industry
Software

Integration
Salesforce, Slack

Key Metric
Increased Agent
Productivity



Challenge

PowerDMS relied on a first-generation cloud contact center that lacked a strong integration with Salesforce and Slack. Their previous solution also hindered PowerDMS's ability to report on key contact center metrics.



Solution

PowerDMS chose Talkdesk Enterprise Cloud Contact Center for its strong integrations, innovative roadmap, mobile-ready capabilities and its ability to give supervisors both live and historical views into agent performance.



Results

PowerDMS has leveraged Talkdesk for Slack and Talkdesk for Salesforce to improve agent efficiency and productivity through a host of real-time alerts and time-saving automations.

Requiring Insight Into Everyday Operations

PowerDMS is a document management software company that specializes in policy, training and accreditation management for companies in the public and private sectors, including law enforcement and healthcare. Through their leading software, businesses simplify how they manage sensitive content, improve their training processes and reduce the time it takes to get accredited. Because their 3,500+ customers frequently deal with sensitive content, it's vital for PowerDMS to provide clear, reliable channels for support.

PowerDMS relied on a UK-based cloud contact center provider that, to their surprise, didn't act like a true cloud-native solution. "Our previous provider lacked the reporting capabilities for simple, yet important metrics like call volume and average wait time. Without visibility into these standard, we were unable to identify areas of improvement," said Casey Hostetter, services manager at PowerDMS. After raising a round of venture capital funding in 2018, and anticipating a significant increase in business, PowerDMS needed improved reporting to ensure customers were getting the best service experience possible.

Making Cloud-Native a Non-Negotiable

Before PowerDMS started evaluating solutions they made one thing clear: “We’re a cloud company, so we only adopt cloud solutions. We don’t even consider anything on-premises,” said Steven Barbarich, IT manager at PowerDMS. With that in mind, the team’s search led them to Talkdesk, an enterprise contact center built in the cloud.

Talkdesk’s Salesforce integration stood out to the team in their evaluation. “Our teams live in Salesforce, so seeing the depth of the Talkdesk for Salesforce integration was impressive to us,” said Barbarich. Because the company relies on Slack as their primary collaboration tool, Barbarich and Hostetter also saw immense value in Talkdesk’s Slack integration. With live dashboards and comprehensive historical reports able to display nearly every key contact center metric, the team felt confident in Talkdesk filling their significant reporting gap. Deep and seamless integrations, an exciting roadmap, robust reporting and innovation as a cloud-native contact center solution drove PowerDMS to choose Talkdesk over other competing providers.

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– STEVEN BARBARICH, IT MANAGER



Since adopting Talkdesk, PowerDMS has taken full advantage of the capabilities that drew them to the solution in the first place.

PowerDMS uses Talkdesk’s live and historical reporting to make informed business decisions and hold agents accountable for the level of service they’re providing customers. “We’ve used Talkdesk’s reporting and analytics to hold agents to a higher standard and identify opportunities for improvement,” said Hostetter.

Talkdesk Live ensures Hostetter and Barbarich have a real-time view into these critical team metrics in order to quickly respond to rapidly-changing contact center conditions. “Talkdesk offers a level of reporting that we could not find in other contact center solutions,” added Barbarich.

Talkdesk for Salesforce has enabled PowerDMS to automate previously time-consuming actions. Now, a task in Salesforce is automatically created when a voicemail is left in Talkdesk. Automations like these have resulted in a significant increase in agent productivity.

The teams use Talkdesk Callbar to make and receive calls from anywhere on their desktop, and by leveraging Talkdesk for Salesforce they’re able to populate Callbar with relevant caller information straight from Salesforce as soon as the call comes in.

Additionally, agents can quickly click into a contact’s record in Salesforce straight from Callbar, allowing them to easily personalize calls and provide a more tailored experience. “Talkdesk is a no-brainer if your teams live and breathe in Salesforce. It plugs right in and it’s very easy to use,” said Barbarich.

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PowerDMS uses Talkdesk for Slack’s real-time alerts and notifications to guarantee teams are fully in tune with key contact center events. Talkdesk and Slack automations immediately notify teams in multiple channels when a voicemail is left, helping reduce the amount of time it takes for callers to get their issues resolved.

Through a simple process consisting of clicks, not code, PowerDMS contact center administrators were able to implement and roll out Talkdesk for Slack without any professional services support.





Setting Sights on Innovation and Mobility

PowerDMS has seen consistent success in the quality of service they deliver customers with Talkdesk as a key partner in driving innovative experiences for customers in the future. With the PowerDMS sales teams using Talkdesk to drive business and acquire new customers for the company, Barbarich sees immense value in Talkdesk Mobile, Talkdesk's mobile app, to empower them to sell even when they're not in front of their computers. "Our sales reps don't like to be tied down to their desk and Talkdesk Mobile gives them what they need to be successful on the go. They can easily make and receive calls and the notes they take automatically sync to Salesforce," said Barbarich.

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When looking toward the future, Barbarich is most excited about the innovation Talkdesk brings to the table. "We've tried other cloud-based contact centers in the past and they don't compare to what Talkdesk can deliver," said Barbarich. Barbarich and Hostetter agree the speed of Talkdesk's innovation and the robustness of the roadmap will enable them to leverage cutting-edge contact center technologies to further perfect the customer experience.

Talkdesk is an innovative cloud contact center platform that empowers companies to continuously improve customer satisfaction. Talkdesk is easy to set up, use and adapt. A "visionary" in Gartner's Contact Center as a Service Magic Quadrant, Talkdesk offers ongoing innovation, superior call quality and instant integration to the most popular business applications. Over 1,800 innovative enterprises around the world, including 2U, Canon, IBM, Peloton and Trivago rely on Talkdesk to power their customer interactions.

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