LIVEPERSON FOR SALESFORCE

Overview

LivePerson's award-winning live chat and multi-channel contact center solutions help you increase online sales, improve customer service and reduce operating costs. A wealth of details is available about your website visitors, allowing you to target those visitors who will most benefit from a chat.

Seamless Integration

LivePerson is completely integrated with Salesforce, providing a 360-degree view of your prospects and customers, increasing agent productivity by eliminating the need for redundant data entry and time-consuming toggling between screens. Now in its third generation, LivePerson-Salesforce integration has been optimized based on current best practices and years of customer feedback.

The LivePerson Agent Console provides seamless access to Salesforce, allowing agents to simultaneously chat with visitors and:

- Access, review and update prospect and customer data
- Create new leads, cases, contacts and accounts in Salesforce with automatic chat transcript logging
- Auto-search for duplicate or mismatched records to save agents time and maintain clean CRM data
- Export chat transcripts into Salesforce
- Incorporate the chat channel into existing business workflows

Key Features

See Who is on Your Site Now – Real-time monitoring features help you determine the best visitors to engage. Select visitors based on keyword searches, whether they're repeat visitors, buyers or chatters, recipients of a marketing campaign, or even by the value of their shopping cart. Use this intelligence to boost conversion rates and build customer loyalty.

Help Visitors Find What They Need – Productivity tools, such as desktop sharing, canned answers and push-page technology improve agent efficiency and increase productivity. Chat agents can easily engage with more than one visitor, enabling you to provide personalized assistance to more visitors.

Measure and Report on Results – Comprehensive reports on individual agents and agent groups reveal valuable insight into your online initiatives and contact center operations. Review chat transcripts for common concerns and questions raised by your customers. LivePerson's robust reporting provides key sales and operations metrics. Additionally, the LivePerson-Salesforce integration, which logs chats as Activities, supports third-party AppExchange reporting and analysis applications without the need for additional effort or investment.

Seamless Integration – LivePerson-Salesforce integration is based on best practices, real-world customer workflows, and direct feedback to ensure that it serves as an agent optimization tool. Chats are logged as Activities, separate from chat transcripts, removing the dependency between activity and content, and enabling proper analysis and ROI reporting. By logging chat transcripts as custom objects, it's easy to assign multiple chats to a single case or a single chat to more than one case. Our integration gives agents the flexibility to select which lead or contact to assign a chat and does not force every chat to be logged, so your CRM data remains relevant and you do not incur the cost of extraneous Salesforce data storage.

Features

- Integrate LivePerson's live chat, click-to-talk and email management channels with Salesforce
- Access, review and update prospect and customer data directly from the LivePerson Agent Console
- Export chat transcripts into Salesforce
- Incorporate the chat channel into current workflows

LIVEPERSON

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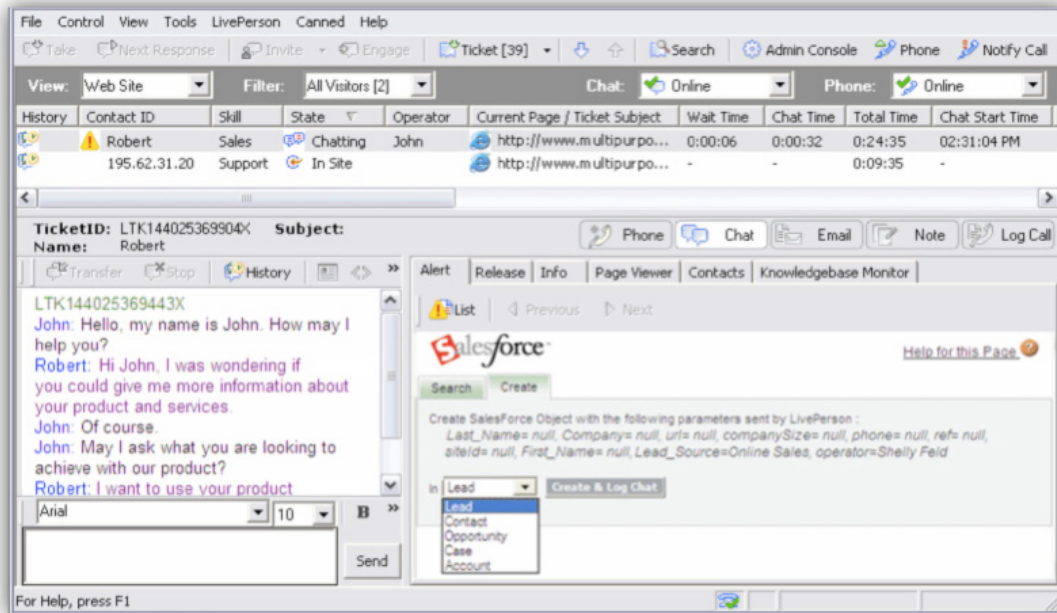
Seamless LivePerson-Salesforce integration means your agents will not need to add customer data twice, nor will they toggle between screens. Agents can chat with website visitors, and simultaneously pull up, or create a new, record in your CRM system from one, unified interface.

About LivePerson

LivePerson is a provider of online engagement solutions that facilitate real-time assistance and expert advice. Connecting businesses and experts with consumers seeking help on the Web, LivePerson's hosted software platform creates more relevant, compelling and personalized online experiences. Every month, LivePerson's intelligent platform helps millions of people succeed online; more than 8,000 companies, including EarthLink, Hewlett-Packard, Microsoft, Qwest, and Verizon, rely on LivePerson to maximize the impact of the online channel. LivePerson is headquartered in New York City.

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