

## Case Study

# SumTotal

### CUSTOMER PROFILE

SumTotal Systems is a learning management software company that develops human resources training for Fortune 500 and smaller companies.

### WEBSITE

<https://www.sumtotalsystems.com/>

### NICE CXONE SOLUTIONS

- CXone Omnichannel Routing
- CXone Interactive Voice Response
- CXone Automatic Contact Distributor
- CXone Reporting
- CXone Agent for Salesforce®
- CXone APIs
- CXone Voice as a Service (VaaS)

### RESULTS ACHIEVED

- Improved Net Promoter Score® by 85%
- Decreased number of escalated cases by 53%
- Reduced case backlog by 50%
- Reduced resolution time for critical cases by 45%
- Decreased incoming call volumes by 30%
- Improved service delivery quality with new mobile support app

### ON THE NICE SOLUTION

“With CXone, we’ve achieved tremendous improvements and measurable results, including increasing our Net Promoter Score by 85%.”

Balaji Balaraman  
Senior Director of Customer Support  
SumTotal Systems



## SumTotal Improves Customer Experience by Developing Mobile Support App with CXone APIs

### ABOUT SUMTOTAL SYSTEMS

SumTotal Systems is a learning management software company that develops human resources training for Fortune 500 and smaller companies. Located in Gainesville, Florida, SumTotal has 200 agents around the globe who handle around 58,000 inbound product support calls monthly.

### THE CHALLENGE

#### Old on-premises system was unreliable and complex to manage

Before moving to CXone, SumTotal Systems was working with an outdated, on-premises system that was unreliable and required upgrades every time the company wanted access to new features.

The old system also had a complex IVR that was difficult to manage. “We had to hire Professional Services to come in and make scripting updates,” says Balaji Balaraman, Senior Director of Customer Support. “The system wasn’t simple to use, and it was difficult to support by ourselves.”

Customers were also frustrated that their calls were often dropped or not answered. “The old system was very inefficient,” says Balaji. “It negatively impacted the customer experience because it took a long time for customers to connect with agents. They could wait days for simple questions to be answered.”

# Case Study

**“CXone Voice as a Service encapsulates our complex telephony processes. All the worry about contracts, maintenance and location is gone since we’ve consolidated our software and telephony with NICE CXone.”**

Balaji Balaraman, Senior Director of Customer Support  
SumTotal Systems

## THE SOLUTION

### Achieving reliability with NICE CXone

When SumTotal acquired a new company in 2011, it needed a contact center solution that would meet the requirements of both organizations. As it happens, the other company was already using NICE CXone.

After surveying the market, SumTotal Systems decided to shift its contact center to NICE CXone, too. “When we compared CXone to other solutions, it made sense to us,” says Balaji. “With CXone, we felt we could achieve greater reliability, increase agent productivity by integrating CXone with Salesforce and simplify our accounts payable process because we would be getting a whole range of services from one vendor.”

Additionally, Balaji wanted to use CXone APIs to develop a mobile support app. “The APIs add another level of customization to CXone,” he says. “We really needed to automate many of our support processes, and we felt the APIs would enable us to do that.”

## OPPORTUNITIES IDENTIFIED

### Improved customer satisfaction with new mobile support app

To boost customer satisfaction, efficiency and agents’ productivity, SumTotal focused on automating support tasks, offering more self-service options and adding additional contact channels. One of Balaji’s innovative solutions was to build a mobile support app using CXone APIs.

Customers can choose from options in the app such as “Call me now” or direct dial. “It routes them to the right agent without going through the IVR’s voice options,” explains Balaji. SumTotal also added self-service features such as AI-powered search, so customers can find answers quickly which, in turn, helps reduce call volume.

The app proactively pushes alerts, notifications and site status to customers. “It eliminates customers reporting site-related incidents and lets our agents focus on more complex issues,” says Balaji.

Customers have enthusiastically embraced the new app, because it has reduced their wait times which, in turn, has drastically reduced abandonment rates. Since customers are using more self-service options via the app, agents can focus their attention on critical cases, and issues are resolved more quickly.

“We’ve achieved tremendous improvements and measurable results,” says Balaji. “Our Net Promoter Score® increased 85%, and our case backlog fell 50%. We’re also resolving critical cases 45% faster. Most importantly, our incoming call volume fell 30%, thanks to the improvements we’ve made with CXone.”

Balaji attributes the mobile app’s quick development to the flexibility of the CXone APIs. “The API interface that NICE CXone offers is very fluid, well designed and easy to learn,” says Balaji. “We stood up the middle layer of the app’s interface in just two days!”

### Increased agent productivity by integrating CXone with Salesforce

By integrating its existing Salesforce CRM with CXone, SumTotal Systems can now provide more complete customer information to agents, who can efficiently and quickly resolve issues.

“CXone Agent for Salesforce enabled us to easily integrate CXone and Salesforce, so our agents no longer switch inefficiently between multiple windows to get relevant customer information. They can also personalize interactions, because they now have the customer’s data at their fingertips,”

says Balaji. As a result, calls are handled more efficiently, while agents also provide a higher level of service.

“NICE CXone is the basic system—the ice cream,” explains Balaji. “Then you can add different toppings to it; the Salesforce integration is an example of one of those toppings.”

### Consolidating software and telephony with NICE CXone

Call reliability suffered with SumTotal’s old on-premises system, which negatively impacted customer satisfaction. SumTotal now uses CXone Voice as a Service which has improved reliability significantly. “Now we never worry about the phone system at all,” says Balaji. “The calls always connect.”

Consolidating both contact center software and telephony with NICE CXone also resulted in efficiency gains. “CXone Voice as a Service encapsulates our complex telephony processes. All the worries about contracts, maintenance and location are gone since we’ve consolidated both our software and telephony with NICE CXone,” explains Balaji.

Balaji also likes the simplicity of working with a single vendor to satisfy his organization’s multiple needs rather than using different companies for software and telephony. “It’s a lot easier to work with one company instead of juggling multiple vendors like we used to,” he says.

For example, acquiring new toll-free numbers is easy and straight-forward. “If we need a toll-free phone number for India, I just request it from my NICE CXone account representative,” says Balaji. “We don’t need to go through another vendor, which makes my life easier.”

This benefit is especially apparent in invoicing. “I don’t have to juggle monthly invoices for different services,” says Balaji. “With NICE CXone, everything is bundled into one bill, and I pay it. It’s simple and saves us a great deal of time.”

CXone has delivered a host of benefits for SumTotal Systems. “The CXone APIs enabled us to

## About NICE

With NICE (Nasdaq: NICE), it’s never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world’s #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center—and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.

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build a new mobile app, which has revolutionized our contact center. We’re more efficient, agents’ productivity has increased, and customers are much happier with our quality of service.”

“Our agents can also service customers faster since we’ve integrated CXone with Salesforce,” says Balaji. “By consolidating our software and telephony with NICE CXone, our call quality is more reliable, and we’ve streamlined processes.”

In conclusion, Balaji highly recommends CXone to other contact centers. “We’ve achieved tremendous, measurable improvements with NICE CXone.