



THE COMPLETE CONTACT CENTER:

Your Contact Center, Built Your Way

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THE COMPLETE CONTACT CENTER

Highly Customizable Contact Center

**What is your ideal customer buying experience?
We can help you build it.**

No two companies have the same criteria for delivering the perfect customer experience. Rather than a cookie-cutter solution, CTM offers you the ability to build a platform tailored to your clientele. Create call flows, queues, and triggers that expedite the journey from prospect to customer while seamlessly capturing the data that helps ensure they return again and again.

In this guide, we'll cover the key features available to you in CTM: the softphone, intelligent call routing and queues, real-time agent reporting with Live Conversations, call recordings and transcriptions, FormReactor®, Smart Dialer, and our security and compliance measures.

Softphone

Use our custom softphone to achieve workforce flexibility and scale without any costly desktop phones.

A softphone is simply a phone powered by the internet, so you can make calls from your laptop, desktop, or any device. For the more technical among us, a softphone is embedded software that enables voice over Internet Protocol (VoIP) telephone calls. VoIP phones can look just like other office phone systems that sit on a desk, but softphones are browser-based or mobile apps.

Maximize softphone advantages with CTM

CTM brings together marketing attribution, intelligent call routing, and an array of other contact center-friendly features to take the hassle out of phone systems so you can focus on conversations. Our developers are regularly enhancing the softphone and its features to make sure you get more value out of fewer tools.



Savings and scalability

The inbound and outbound softphone is included on all CTM plans. Plus, there's no cost to add a new employee to a softphone, unlike purchasing an expensive desk phone.



Flexibility and ease of setup

Need to work from home, or take an entire contact center remote? With the softphone, just log in from your new location and pick up where you left off. A headset, computer, and the internet are all you need; no need to configure or move hardware.



Powerful integrations

Sync critical customer information from your CRM or service platform into CTM, so your team has all the info they need to assist customers and close the sale.



Real-time analytics and the wrap-up panel

After a call has ended, the softphone wrap-up panel appears, allowing the agent to add notes and tags, manage contact information, score calls, and mark conversions in one place (rather than getting lost on a sticky note).



Captain Dave's Dolphin Safari saved hundreds in monthly costs by switching to the softphone, and now enjoys other features that support agent growth and development.

[Read the case study](#)

Smart Routing

Tired of saying “Please wait while we transfer you to that department”? Achieve the fastest resolution, with the greatest satisfaction in the shortest time, with CTM’s intelligent call routing.

Smart routing helps increase conversions, customer satisfaction, and overall efficiency within contact centers by allowing businesses to route calls based on the caller’s online activity, their history with your company, their demographic information, or custom fields you create in the software.



Call queues

Route calls to groups of agents based on schedules, weightings, skills, or caps using different routing styles, like round robin and sticky routing.



Geo routing

Distribute calls based on the location of the caller. You can even set rules for how to handle calls coming from locations you don’t service.



Remote-friendly softphone

Route inbound and outbound calls to your staff, no matter where they’re based, and eliminate the need for complicated handheld phone systems.



Automatic spam detection

Automatically detect if a call appears suspicious, and route those calls to a menu or require them to complete a CAPTCHA before reaching a live agent.



“I love the smart router—it can do so much, so fast!”

– Sheri Frederick, **Technical Solutions Consultant III**

The use cases are endless. Here are just a few:

Route repeat callers directly to the right agents based on their language preference.

Set a holiday schedule in advance so that a special message can be played when your office is closed.

Immediately route clients to the sales agent who manages their account.

Queues

Queues provide an effective way to route calls and other activities using simple or sophisticated patterns to ensure that all inquiries are getting into the correct hands quickly.

Designing your queues and routing scenarios can increase first contact resolution and provide a better experience for both your customers and agents.

Agents

Each agent can have their own availability schedule, and they can alternate between answering contacts on their landline, mobile phone, and softphone, depending on where they are. Reporting shows activity by agent so that you can stay on top of call volume, quality, and performance.

Custom hold and waiting audio

Call queues feature custom hold audio, allowing you to customize the announcements, music, and ringtone you want your callers to hear as they wait for their call to be answered.

Schedules and no answers

Queues can be assigned to custom schedules and allow you to decide how you want to handle the call if no one answers in the queue. For example, the call could roll over into another queue, ring to an after-hours call center, or be routed to a voicemail box. This ensures that no call goes unaddressed.

Custom post-call surveys

Post-call surveys prompt agents to score and categorize activities so that you can keep track of advertising channel and agent performance. Call scores and information will be accessible in the call log as well as in the reporting, so you can see which agents and tracking sources are making the most sales.

Align agents with teams

Unify specialized groups of users with our Teams function, which enables you to customize the group's access level, settings, specialized softphone functions, and even custom wrap-up panels.

Routing Options

Simultaneous routing

Dials each agent in the queue at the same time or in groups based on the weighting provided. The first agent to answer gets the call.

Round robin

Rotates between each agent evenly so they all get the same number of calls.

Sticky routing

Tries to route the caller back to the same agent who was first connected to the caller, helping to establish customer relationships.

Weighted routing

Lets you set a weight for each agent to adjust for different skill sets and capacity for each of your agents.

Smart routing

Distributes calls based on attributes of your callers such as their location, history, demographics, or other custom fields, such as account ID, that you create in the software.

Sequential dialing

Calls each agent in a defined order until someone picks up.

Real-Time Agent Reports

Gain instant visibility into the performance of your contact center agents.

CTM's real-time agent reporting provides you with a live dashboard view into the current activity in your contact center. With one glance, you'll know your current call volume, what your agents are doing, and how performance has been for the day so far, so you can make informed decisions quickly to support your team and your customers.

- ✓ Know when your agent is on a break versus taking calls or chats
- ✓ Analyze how your agents perform amidst high or low volumes
- ✓ Discover your top-performing agents, and use live coaching tools with agents needing further support
- ✓ Balance your understanding of key metrics like ring time and talk time against agent availability

Go from monitoring to managing with Live Conversations

Live Conversations gives contact center managers a unified, real-time view of every active call and chat, complete with AI-powered live transcription. Instead of seeing only that calls are happening, you can read what's actually being said across all your active conversations—then take immediate action on calls in progress, even while remote.

Live Listen

Silently listen to in-progress calls without interrupting the conversation.

Barge

Take control of a call and remove the agent without requiring a transfer.

Whisper

Coach agents privately during a live call without the caller hearing you.

End Call

Remotely terminate a call that's headed down the wrong road.

Because managers can monitor multiple conversations at once via live transcripts, not audio alone, they can step in to coach an agent or defuse an escalation while the conversation is still happening, before a bad call costs a deal or creates a compliance exposure.



"The ability for our agents to log in from home, and for us to monitor call queues and live agent productivity, has been a no-brainer for us."

– Cynthia Cassidy, VP of Sales Center at [10Xfive](#)

Call Recordings & Transcriptions

Call recordings provide a wealth of information about your customers and your team so that you can identify performance issues quickly and stay on top of your customers' needs.

For contact center managers, recordings and transcriptions are the foundation for coaching agents more effectively, spotting the patterns behind challenges in customer conversations, and making security and compliance easier to monitor and maintain.

Live Listen

With live listen, you can tap into live calls without interrupting the conversation or alerting either party. It's a great management tool for coaching your team in the moment and quality-checking how your team is handling calls.

Call whispers

Call whispers are used to announce important information, such as the call being recorded, to your callers as the call is being connected. They're also a great way to alert your staff to the advertising source of the call, giving agents the context they need to start every conversation strong.

Security

Use features like two-factor authentication and encrypted storage to safely provide access to call recordings to people in your business or to your clients. Set passwords to control access to any audio files, and automatically redact sensitive keywords like Social Security numbers and credit card numbers from transcriptions, so compliance stays easy to monitor and maintain.

Transcriptions

Call transcription transforms the audio of your calls into speaker-organized scripts, making them a great tool for reviewing calls quickly, spot-checking performance, and pinpointing coaching opportunities without listening to every recording. Cost varies from plan to plan and is billed on a per-minute rate.

Notifications

Custom reports can be emailed or text messaged after a call is completed or on a schedule. Notifications give you the option to include the call recording and transcriptions in your reports. Having the call recordings emailed or texted is a great way to stay on top of your team's conversations while working remotely or traveling.

Keyword spotting

CTM's keyword spotting tool can automatically scan those transcriptions for you, looking for the presence of certain keywords and then alerting you when patterns are identified, or automatically redacting sensitive information. It's an easy way to surface recurring challenges in customer conversations and keep sensitive data protected at scale.

FormReactor®

Turn online form submissions into powerful data sources, and immediately trigger contact as soon as a customer indicates interest in your business.

Using **FormReactor®**, we will associate each form fill with the exact website visitor that completed it as well as the advertising channel that led to their visit (including campaign, ad, and search keyword). Easily visualize and isolate how many calls, texts, and forms each of your advertising channels generate so you can provide the full picture for your marketing, sales, and support teams.

How Does FormReactor® Work?



Patients can book appointments via FormReactor®. Enable CTM to send an automated confirmation text and a follow-up email to both the patient and the provider.

Clients can send emergency requests, such as water damage or pest infestations, via FormReactor®. Your team is able to connect instantly to provide urgent assistance.

Leads can fill out FormReactor® forms to opt into promotional messaging. They'll be added to an autodialer campaign, receiving a personalized confirmation text to validate.

84% of marketers say they rely on form submissions as a primary conversion tool.

– HubSpot

It's critical to engage these leads in their moment of interest before they move on to other options.

Smart Dialer

Maximize productivity and conversions with CTM's smart dialing technology.

This productivity-driving feature automates your contact center's outbound calls based on criteria and timeframes that you customize, helping your team instantly connect with prospects and customers in need.

By defining rules and milestones in Smart Dialer's control panel, you can manage your calls simply and strategically in line with agent availability and caller behavior. The result is increased responsiveness, better lead cultivation, and higher conversion rates.



Intelligent dialing

Evaluates the agents-to-list ratio to ensure an agent will be available to take the call.



Dial-out schedules

Protects your agents from placing outbound phone calls to locations and time zones outside of the time schedule.



Agent productivity

Increases productivity with automated scripts, pre-recorded voicemails, and repeat call prevention.



Security features

Includes features like "Do Not Call List" detection and secure call recordings.

Smart Dialer connects you with prospects and customers in need of service in the right way at the right time, boosting conversions and helping you provide the outstanding service that sets you apart.

By leveraging your existing CTM configurations, your agents will find themselves connected efficiently and progressing from call to call without missing a beat.



Works seamlessly with: Softphone, FormReactor®, custom triggers, call queues, text messages, voicemails, and scripts.

Security & Compliance

At CTM, call data security is a top priority. Customers benefit from a data center and network architecture built to meet industry-standard encryption and redundancy requirements. Our user-friendly security measures make it easy for customers to spend less time on compliance and more time running their business.



Encrypted data

CTM provides several options to keep data secure by encrypting its entire platform using Transport Layer Security (TLS). Data can be at risk even while at rest, and security demands that stored data be encrypted as well. CTM's platform uses encrypted volumes to safely store recordings, transcriptions, log files, and other call data.

Secure notifications

Customize notifications so that certain fields containing sensitive information can be removed to prevent the distribution of this information. In addition, URLs linking to audio recordings inside notifications can have multiple layers of security so that only specific people with designated logins and secondary PINs can listen to calls.

Logging

Any time call recordings are accessed or modified, that event is logged in the CTM platform by user, IP address, and timestamp. Each user's unique login credentials associate them directly to their activity within accounts. Every call recording playback is logged so that administrators know when a call has been reviewed.

Secure access

Individuals have their own login to access the platform, and all of CTM's plans allow for an unlimited number of users and a variety of access levels. Additional layers of protection such as two-factor authentication and automatic timeouts can be enabled. Additionally, administrators can also restrict which call data fields each user group can see, ensuring that sensitive data is only accessed when necessary.

Dedicated servers

To maintain compliance, CTM uses dedicated servers to protect sensitive information. Dedicated servers are exclusive to CTM and not shared with outside companies, eliminating the risk of sensitive data being distributed to unauthorized sources.

Consent

FormReactor® gives you the ability to add consent language and check boxes into your forms and track that consent or opt-in with each online form submission. You can also trigger workflows based on a form field disposition or other activity indicator that places the contact (phone number) on an account-wide "do not text" and/or "do not call" list.

Spam Detective

Spam Detective automatically identifies suspicious inbound calls and routes them to a menu or requires a CAPTCHA before they ever reach a live agent, protecting your team's time and keeping your call data clean.

Redaction

CTM provides the ability to either manually or automatically redact any personally identifiable information from call, text, and form records. Secure call transcriptions allow the system to detect when credit card information, Social Security information, or phone numbers are spoken during a call, tag the call appropriately, and redact that information from your call transcriptions and associated call recording.



Exceed Expectations and Grow Your Business

When your team is able to work smarter, not harder, you make it possible to truly wow your customers. Discover how contact centers like yours have utilized CTM to automate their internal processes, drive stronger team performance, and improve the quality of their customer interactions.

Book a Demo



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