SPEAR EDUCATION
TEACHES A VALUABLE LESSON IN CONTACT CENTER MANAGEMENT
Leading Dental Education Provider Improves Customer Service and Saves 35 Hours per Week

Spear Education, a leader in continuing education for dentists, is committed to providing the best proactive customer service for their network of dentists.

Because it has thousands of customers spanning six lines of business, it's important for the company to record every interaction within NetSuite's CRM, as well as ensure that customers' calls are being routed to the right agent in the right business line.

To guarantee its customers were getting the best service, Spear Education needed contact center software that seamlessly integrated with NetSuite without any custom code or development work.

“We chose Contivio because of their flexibility and offering. Contivio was able to post communications to NetSuite natively without any custom work to bog us down. Our reps click to dial the phone number in NetSuite, the call goes to their headset, they notate it inside Contivio and it pushes back to NetSuite—works great every time.”

Andre Sprague, Project Manager, Spear Education
“We have a complicated business model, and Contivio has been able to deliver the custom routing we need to provide the best experience for our customers.”  

**Challenge**
Disconnected from NetSuite, Spear’s old phone system missed the mark on providing a holistic view of all customer communications. It also didn’t offer the ability to record calls, which Spear needed for training and quality assurance purposes. To extend its NetSuite investment, save valuable agent time and provide better customer service, Spear’s goal was to marry the call center with the CRM data. Spear researched several contact center solutions, but found that Contivio’s NetSuite integration features were unrivaled.

**Solution**
Contivio’s patented CloudConnect technology seamlessly integrates with NetSuite to provide Spear with a 360° view of its customer interactions. Contivio routes inbound callers to their assigned rep in NetSuite, screen pops relevant customer information, and saves all call notes, dispositions and call recording links to each customer’s record in NetSuite.

**Results**
After implementing Contivio for their contact center, Spear was able to increase agent efficiency by two minutes per inbound call and 30 seconds per outbound call, saving the company 35 hours of rep time per week. Now Spear’s agents can reinvest that time by placing 4,000 more outbound calls per month.

**Reducing outbound call handling time with Contivio’s NetSuite integration**
Spear’s representatives place outbound calls by clicking on the phone number from a NetSuite record (“Click-to-Dial”) or by using Contivio’s Preview or Progressive Power Dialer via NetSuite Saved Searches.

Andre Sprague, Spear Education’s Project Manager, explains the outbound process with Contivio and NetSuite in four simple steps: “Our reps click to dial the phone number in NetSuite, the call goes to their headset, they notate it inside Contivio and it pushes back into NetSuite—works great every time.”

**Using Computer Telephony Integration (CTI), Contivio leverages NetSuite data to route inbound calls to the right rep**
On the inbound side, Sprague notes “We have a complicated business model, and Contivio has been able to deliver the custom routing we need to provide the best experience for our customers.”
Contivio’s Priority and Adaptive Routing capabilities ensure Spear’s customers are put in touch with their dedicated sales representative per business line (as assigned in NetSuite). When the right rep is found, Contivio “screen pops” the customer’s record in NetSuite so the rep knows exactly who’s calling and what the latest activity has been.

**Increasing agent efficiency using Queue Voicemail**
Spear is also using Contivio’s “Queue Voicemail” feature for inbound calls that come from an unknown number. Contivio searches NetSuite for the number, and if it’s not found, Contivio automatically sends the customer to voicemail. Once the customer is done leaving a voicemail, it goes into the queue and the next rep will listen to the message, assign it to the correct agent and link the call in NetSuite.

**Tying customer communications back to Spear’s bottom line**
Utilizing Contivio’s disposition fields and supervisor reporting, Spear is able to pull reports to gauge how long agents are spending per call type (i.e. onboarding, check-in call, renewal call, etc.) per business line, and tie it back to the success of the customer. For example, the company found that the length of time customers are engaged on the phone directly correlates to renewal rates.

Lastly, Spear now has the ability to identify the best times of days to reach its customers based on Contivio’s dispositions, allowing the company to increase its connection rates and spend more time speaking to customers.

**Next steps for Spear’s contact center**
As a next step, Spear is in the process of automating its survey distribution to get insights into Net Promoter Scores per department, agent and product, as well as shift how it’s measuring KPIs to drive the right behaviors—all now possible by using Contivio to integrate the contact center with the CRM of choice: NetSuite.

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**SPEAR**

**Company Snapshot**

**Company:** Spear Education  
**Location:** Scottsdale, Ari.

**Partner Name:** Contivio  
**Location:** Irvine, Calif.