



IS YOUR BUSINESS GROWTH STUCK ON HOLD?

Beat the competition with these 5 phone secrets.

LET'S START WITH A QUICK SELF-EVALUATION.

How do you communicate with your customers today? Is it the same (or pretty similar) to how you communicated with your customers 5, 10, or 15 years ago? Where has it changed or evolved?



INTRODUCTION

If your business is like most businesses, some of your communications have changed dramatically, while others have largely stayed the same. For example, 5 years ago your business wasn't sending text reminders to customers about their upcoming appointments. Ten years ago, you likely didn't have a company Facebook page. And 15 years ago, you weren't even thinking about online customer review sites – and the truth is, neither were most of your customers. But your office phones have been happily sitting on your desks the whole time.

If your current sales and marketing campaigns are not generating the kind of growth you want, then the culprit may be an outdated phone system that is stunting your business growth.

Whether you realize it or not, however, business phone systems in 2019 have evolved just as much as any other form of business communications. And they are definitely more than just the dial tone connection of 2004, 2009, or even 2014. Today, business phone systems serve as the foundation for your company's customer communications and engagement strategies. Whether your customers prefer to call (or be called), text (or be texted), video-conference, or log in to a mobile app on the go, your phone system can be the platform for engaging with customers on their terms, setting you apart from your competition, and helping you accelerate the growth of your business.



The following five tips explore the heart of how your phone system could give your business the jump start it needs.



TIP #1

THINK REFRESH

If you haven't updated your phone system since 2014, chances are you're missing the first (and easiest) engagement points with your customers and prospects.

The last five years have seen the evolution of business phone systems from expensive, closet-based, rack-mounted hardware that was expensive to deploy and complex to manage, to agile, budget-friendly, cloud-based solutions that can be deployed quickly and easily and managed from anywhere. With that evolution, we've seen phone systems progress beyond the basics (answering, managing, and routing calls) to advanced integration and automation functionality and mobile applications. Bottom line? If you still think phones are simply there to make and receive calls – think again. Today, your business phone system could (and should):

- **Simplify your operations:** stop committing valuable IT resources (budget and staff) to your business phone system. Reduce monthly operating costs without the massive capital outlay required for a traditional deployment and then use intuitive, web-based management tools to easily manage moves, adds, and changes on the fly. Reinvest your IT resources on projects that are mission-critical to your business.
- **Unify your communications:** integrate talk, text, meetings, video, and more into a single, simple platform. Administer the whole thing from a simple interface, with a single vendor and a single bill.

- **Connect your employees:** whether they're in the office, working remotely, or on-the-go, provide every employee with the communications tools they need to stay connected.
- **Virtualize your meetings:** reduce the expense of traveling to remote locations for internal, prospect, or customer meetings. With high definition audio and video meetings, you can be in the room with employees, customers, and prospects, without ever leaving the office.
- **Integrate your systems:** since cloud phone systems are software-based, they integrate seamlessly with the software tools you use to run your business. From email and workplace productivity tools like Microsoft, Google, and Slack, to CRM/PRM systems like Salesforce, Microsoft Dynamics, Zoho, and more.

Wondering about the reliability and security factors? With geographically dispersed datacenters, active-active redundancy, and network architectures designed for high availability and security, cloud phone systems today deliver **99.999% uptime**. And unlike the closet-based systems of the past, you don't have to worry about what's happening at the office and how it will impact your phones. Talk to your IT partner or service provider to understand what they're doing to ensure your communications never go down.



TIP #2

DIG INTO THE DATA

You probably never thought of using your phone bill as an analytics tool. Think again.

Every business relies on its data to understand, manage, and improve. We monitor, measure, and analyze data within every function of the business – from marketing campaigns, to customer support operations, product development, sales forecasting, and beyond. If your business phone system isn't providing you with your call data, you're missing some of the most basic, actionable data your business produces. Call analytics can help your business understand:

- **Who is calling you?** More than just a list of phone numbers, call data can tell you who is calling, where they're calling from, and when they're calling (and when they're not).
- **What is the caller experience?** Evaluate response times, ensure you have appropriate call coverage for your sales and support teams, and reduce hold/wait times. Provide every caller with an efficient, responsive experience. And if you do miss a call, ensure that every missed call gets a personal callback from sales.
- **How are your marketing campaigns performing?** Measure the effectiveness of out-of-home direct mail, billboard, digital, and other campaigns with inbound call heat mapping, dedicated campaign phone numbers, and more.
- **How efficiently are your sales and support teams working?** Manage your teams smarter, relying on call data (and not perceived engagement) to identify your highest performing team members and build processes to expand that functionality and best practices across your organization.





But wait, there's more! Using your call data to improve business operations is only the beginning. In 2019, the best business phone systems also come with a softphone and mobile applications. These tools let your employees work from anywhere – while still using their business phone number for talk and text (SMS). This means that you – the employer – maintain the call data, as opposed to losing it to your employee's personal cell phone carrier. For sales-driven organizations that experience a high level of natural turnover, the question of who owns the call data can be critical, as outgoing sales staff quite literally take all your hard-won leads, prospects, and customers with them when they go.

With a business mobile or softphone application, you give every employee the freedom and flexibility of working on-the-go, while ensuring that your most valuable asset – information – stays with the business, not the employee.

When considering a hosted business phone solution, be sure your IT partner or service provider demos the call analytics and mobile functionality of their solution. Whether it's better visibility or more accountability you're looking for, be sure you're getting the most from your communications spend.



TIP #3

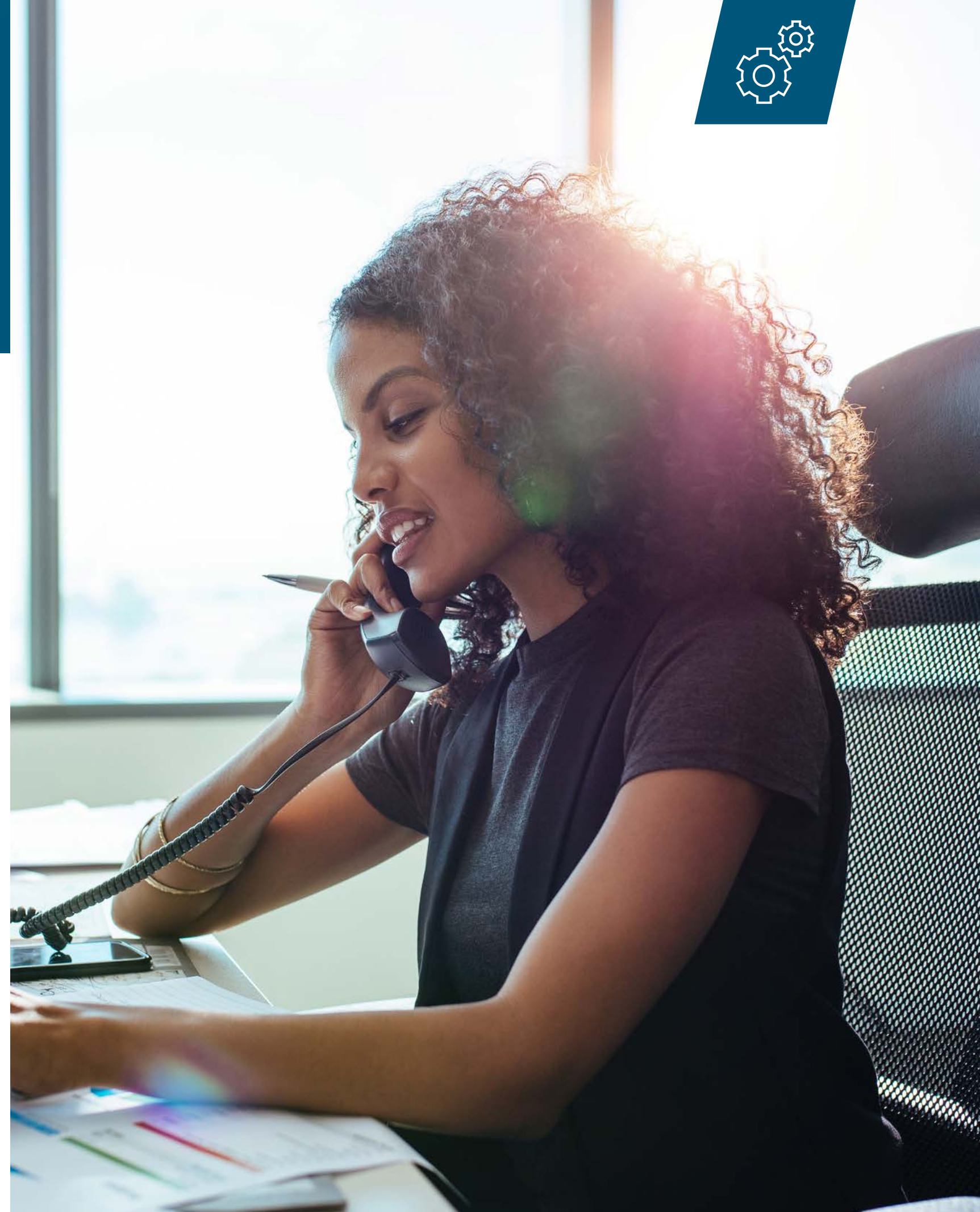
AUTOMATE THE SIMPLE STUFF

If your phones have been sitting on your desk for more than five years, chances are you're still using them the same way you did five years ago.

Has your business ever missed a morning full of calls, simply because the receptionist forgot to switch the phones out of night mode? Is someone in your business working with a third-party company to send out text reminders to your customers for upcoming appointments? Have members of your business stopped using desk phones altogether, allowing spam voicemails to pile up on their lines until boxes are full?

Each of these is a prime example of functionality that could be automated quickly and easily with a new business phone system. Talk to members in each operational group of your business; chances are you'll find many of the following day-to-day communications activities could be automated.

- **Auto-attendants.** Most callers want to shorten their hold time, reduce the number of times they need to explain their issues, and be directly connected with the person who can most efficiently solve their problem. When was the last time you updated your auto-attendant menus? With a hosted phone system, you can quickly record and upload new greetings from a simple web interface – and improve the caller experience just as quickly.





- **Music and messaging on hold.** Have you ever endured your business's hold music? Have you considered adding promotional messaging to play while customers and prospects are on hold? Again, uploading customized music and messaging is quick and easy with a hosted phone system. And if you have multiple locations, you can upload it once and apply it to every location on the system. Let hold time engage – not drive away – your customers.
- **Scheduled call routing.** Set automated night/weekend hours, schedule holidays, create customized routing rules – and then forget it. Never worry about switching in and out of night mode again.
- **Business texting.** Send texts (SMS) directly from your softphone or mobile application, without requiring a third-party vendor to work with your sales, marketing, or support teams.
- **Simplify system management.** Add, remove, or edit users from a single browser window, using intuitive, visual, drag-and-drop applications. Never call the vendor or pay for a certified technician to come out and update your phone system. With as little as one hour's training, any employee can move, add, or change users, order new phones, change call routing, update schedules, or edit any feature or function of the system.

Simplifying daily communications activities may not save your business millions of dollars or thousands of hours – but it will allow your employees to get back to their real job and away from the phones. And with a hosted phone solution, you never have to worry about upgrading your system again. Because the phone servers and application software are hosted by the vendor, they are responsible for upgrading everything – while you can confidently access the best and most up-to-date unified communications features and functionality. Reach out to your IT partner or service provider to learn more about the simple ways a new business phone system can improve your operations.



TIP #4

INTEGRATE FOR EFFICIENCY

Use your business phone system to do more than just route calls.

You're probably not thinking about how you can integrate your business software tools and systems with your phone system. But you should be. Give your company an edge, by offering every customer a personalized experience, eliminating the friction of switching between systems for your employees, and track, record, and assign activities automatically. Start with the teams that use the phones the most – sales and support – and learn how you can connect their phones to the other tools they use every day to:

- **Connect customer and prospect data to your phone system.** Caller ID is really only as good as the data behind it. Connect your phone system to your CRM so you know who is calling – every time.
- **Display caller records before you answer the call.** Use screen-pops to immediately understand who's calling, how best to route their call (manually or automatically), and quickly connect them with the right resources.
- **Take notes in the call window.** Provide your sales and support teams with instant access to record notes so they can anticipate customer needs and position additional sales/support opportunities appropriately. Then, allow your sales and support teams to update records in the screen pop – staying in a single application, as opposed to moving between multiple applications to achieve the same result.

- **Connect applications to track activities.** Use auto-dialers and send text messages and other alerts/notifications through your business phone system so that historical data and messages are recorded in real-time for each account.
- **Move seamlessly between communications platforms.** Schedule video conferences and send email invites with your meeting dial-in information from your calendar application. Look at business texts (SMS), inbound/outbound call histories, voicemails, and internal instant messages (e.g., Slack or Google Hangouts) from a single communications dashboard.

The best business phone systems integrate with workplace software you use every day – from Microsoft Outlook and other Office 365 applications to CRM platforms like Salesforce, Zoho, or Microsoft Dynamics. They also work with industry-specific tools like Patient Relationship Management (PRM) software, Dealership Management Software, Legal and Wealth Management practice management software, and more. Work with your IT partner or your service provider to identify the best solution for you and your business model.

TIP #5

FLIP THE SCRIPT

Answer every phone – sales or not – with sales in mind.



Businesses in every industry invest every day in training their salespeople to be better salespeople. But often, they don't extend that training to other teams across their business that interface with their prospects and customers. One of the best – and most overlooked – ways to use your phone system to grow your business is to train your employees to use phones as a sales tool. Even – and most especially – when those employees are not in sales. Apply the lessons learned in sales to support, billing, marketing, and more to increase engagement, identify business problems, offer solutions, and build brand loyalty with every interaction, including:

- **In sales:** Train every team to think about the business problems your solution can solve. Focus on core messaging and positioning opportunities with every team. Eliminate pushy sales pitches with active listening and helpful, proactive suggestions.
- **In support:** Review account activity and notes to identify good opportunities for additional services, support, and product upsells. Then, take good notes, tag growth opportunities for the sales teams and identify hot topics and pain points for proactive attention and follow-up.
- **Across the business:** Capture positive feedback and tag for customer reviews and do more than just provide a positive interaction - really engage with customers.

Companies that master the art of flipping the script are proactively identifying ways to grow their business within their existing customer base. They are converting prospective customers into loyal, long-term customers who feel listened to and understood. They are encouraging those customers to share the message in online reviews, and they are increasing account value with the right mix of additional products and services that meet their customers' needs. Quite simply, they implement what's working in sales across their business – and they do it in every interaction, on every call.

CONCLUSION

If your business phone system has been around for more than five years, now is a great time to consider upgrading to a modern phone and communications system. You'll be amazed by how much things have changed in the last few years. Remember what it was like transitioning from a flip phone to a smart phone?

It may seem a bit intimidating to upgrade your phone system, however, the transition is much simpler, faster, and easier than you may realize. Plus, once you upgrade, you'll immediately start to see the benefits of having an easy-to-use, affordable, and comprehensive system that allows you to communicate simply and easily with coworkers and customers.

As you evaluate systems, be sure to consider the following points as they will help ensure you find a solution that's a perfect fit for your business.

- **Pricing:** Is the new system less expensive than an on-premises solution? Does it offer all-in-one, easy-to-understand pricing from a single vendor? Does it cost extra for upgrades? Is it easy to scale up or down your license count?
- **Simplicity:** Is it easy to administer? Does it require a contractor to make updates or can you do it yourself? Is it easy to learn?

- **Comprehensive:** Does the system offer a comprehensive communications solution – phone, text, chat, video conferencing, integrations, and more?
- **Mobility:** Does it provide you with mobile applications, desktop phones, and web apps?
- **Integrations:** Does it integrate with the software that you use today (CRM, PRM, email, databases, etc.)?
- **Analytics:** Can you easily view call reports, analytics, dashboards, historical data, and more?
- **Support:** Is free technical support included with your plan? Is support available 24/7/365? Is the support team responsive and helpful?
- **Reliability:** What are other businesses saying about the solution? Are they happy with the provider's service? And what about uptime - is it 99.99%? Do they have systems in place to ensure your systems don't go down? Is the provider experienced with your industry?
- **Security:** Can the provider clearly detail what they are doing to ensure your communications are secure?

KEY TERMS

Let's review a few helpful key terms:

- **Screen pop:** a pop-up window that displays caller details pulled from a database (name, number, notes, etc.).
- **VoIP:** Voice over Internet Protocol – a phone system that delivers voice communications over the internet – rather than through physical servers located at a business.
- **Hosted:** similar to VoIP. Refers to internet-based phone systems managed by a provider – rather than managed by the customer.
- **UCC:** Unified Communications & Collaboration – technology that combines voice, text, video, chat, and more.
- **UCaaS:** Unified Communications as a Service – subscription-based phone and communication services (voice, text, video, chat, and more). Typically from a single technology provider.
- **SMS:** Short Message Service – text messaging sent over a cellular network.
- **Softphone:** software-based phone technology that works on a computer, smart phone, or tablet, and sends communications over the internet rather than through a desktop phone.



UNIFY YOUR COMMUNICATIONS WITH GOTO

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