



# Transforming Customer Engagement for Small and Medium Businesses



A close-up photograph of a person's hand holding a silver smartphone. The person is wearing a dark suit jacket and a white shirt. The background is blurred, showing what appears to be an office setting with a window and some indoor plants.

## Introduction: Going Beyond Just a Phone

You may not realize it, but as a small or medium business (SMB), your communications system is one of your most important investments. It's your primary connection to customers, partners and suppliers, and therefore a crucial component for business success.

But what if your business phone system could do more than just handle phone calls? What if you could also answer customer questions and resolve customer issues faster? And what if that same system could provide a platform to grow your business? The right solution that includes all aspects of communicating and interacting with your customers can unleash new ways of boosting your business that you didn't know existed.

"Engagement" is the new black. Every company strives to provide its employees with the tools to better communicate with customers, partners and co-workers to improve both employee and customer engagement. Positive employee engagement and customer interactions go hand in hand, and companies that enable workers to communicate and collaborate effectively with each other, and with customers, will stand out from the competition.

SMBs are rapidly turning to the cloud for their business communications and customer engagement needs. The cloud is a great equalizer, enabling SMBs to use the same tools as enterprises, but at lower costs and with simplified deployment, management and maintenance, leading to better engagement and business outcomes. Today's cloud communications systems can even make a "mom and pop" shop look like a global business, helping them to better compete and succeed.

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## SMB Goals and Challenges

SMBs have the same goals as larger organizations, but also realize that they have some unique challenges. Like any organization, they want to improve employee productivity, enable greater worker mobility and grow their business. An intelligent business communications solution that simplifies deployment, management and maintenance while delivering powerful engagement capabilities allows their team to better focus resources on their core business and provide exceptional customer experiences.

With more limited resources, SMBs have to overcome several challenges:

- **Doing more with less:** SMB workers need to wear multiple hats and often perform jobs that would be done by specialists in large enterprises. With fewer workers, SMBs need each and every employee to be as productive as possible. They require the right tools to enable employees to better communicate and collaborate from any location and with any device, but these tools must be easy to deploy, administer and use.
- **Mobility and accessibility:** Similarly, with fewer staff, individual workers have a greater need to be in touch and accessible, especially when working remotely. Since many SMBs do not have offices and branches throughout the country or world, the need for workers such as sales and service reps to always be accessible is even greater.
- **Customer service and support:** Today's customers demand and expect more personalized and effective customer interactions from the companies they do business with. If they don't get the service they expect, these customers can easily take their business elsewhere. SMBs need to provide the same level of service and support to customers as their larger competitors. Creating better customer engagements and interacting with customers more efficiently is essential, especially for SMBs that may not have a formal contact center for routing, distributing and queueing calls.
- **Enterprise capabilities without the enterprise price tag:** In an increasingly competitive environment, SMBs need to provide employees with communications tools featuring rich functionality to facilitate better collaboration. However, getting the right level of functionality at the right price isn't always easy, as many of these systems are aimed at large enterprises with big budgets. In addition, traditional premises-based solutions are often challenging for SMBs to purchase, deploy, manage and maintain. Accessing the same sophisticated, full-featured business communications tools as larger enterprises has been a huge challenge for SMBs. Fortunately, cloud-based services that bring together phone, collaboration and contact center capabilities help level the playing field.





## The Case for Integrated Cloud Communications Solutions

Purchasing a business communications solution has traditionally meant buying a premises-based phone system. Adding to the complexity, in order to get a complete solution, businesses have needed to purchase and deploy a range of systems—often from different vendors—for their phone, messaging, collaboration and contact center requirements. Integrating all of these separate systems to work together properly often requires highly specialized resources. Disparate products can be a challenge to manage, creating a nightmare for SMBs that may not have the resources to deploy, manage, maintain and support these products.

Fortunately for SMBs, times have changed. Cloud communications solutions can provide all of the “ilities” that SMBs are looking for, including scalability, functionality, flexibility, reliability and mobility without the deployment and management hassles of premises-based systems.

Simplifying the user and IT experiences, new all-in-one, cloud-based communications solutions for voice, video, collaboration and customer interaction tie all the pieces together, helping companies better interact and engage both internally and externally.

With such a solution, deployment, management and maintenance are greatly simplified, saving businesses time and money, with no finger pointing between vendors. For IT, there’s “one-stop shopping,” one system to navigate when issues arise, less tweaking needed to ensure everything works as advertised, with little need to add code or software to make the pieces work together. Users can seamlessly move from one communications channel to another without having to worry about integration challenges.





## Complete Business Communications

Today's cloud-based communications services provide enhanced capabilities such as instant messaging, audio and video conferencing, and mobility. In addition, cloud-based contact center services let businesses of all sizes access fully featured contact center offerings without having to invest in expensive automatic call distribution hardware and software. Designed to distribute incoming calls to maximize the number of fielded calls while keeping customer satisfaction high, cloud-based contact center tools increase customer engagement and help sales reps make numerous outbound calls more efficiently.

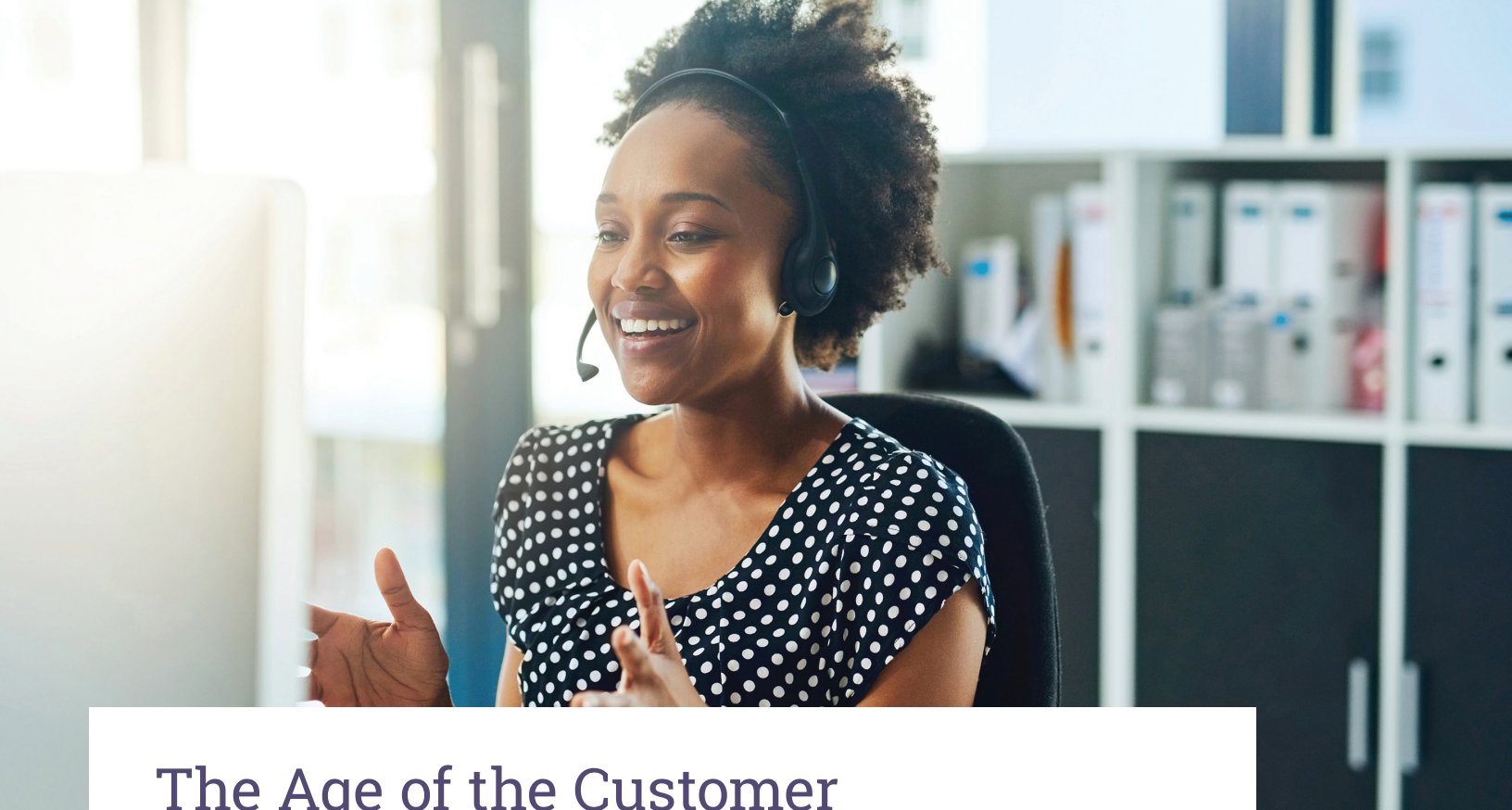
Merging together business phone systems and contact center capabilities form a complete business communications solution. With a range of functions including conferencing, video, mobility, team messaging, collaboration, call routing and call queueing, business communications tools improve employee collaboration and productivity throughout the organization.

Imagine how much productivity can be improved when:

- The sales rep or sales manager sees an informational pop-up screen with context and customer history whenever a customer calls, plus has access to all of their account details and is even able to record the call, or
- A customer call gets intelligently routed to a customer service rep, who is able to resolve their issue and can click-to-call someone in marketing from within the customer relationship management application to discuss a new promotion.

With a single cloud-based communications platform, SMBs can get the functionality they need to improve their business operations, internal and external communications, employee collaboration and customer service without having to invest in expensive premises-based point solutions.

SMBs can project a big-company image, providing the same level of customer care as large enterprises, without the large investment. In addition, consolidated reporting and analytics provide key insights to help improve performance throughout the organization. With a holistic view of calling and interaction patterns, businesses can optimize operations, increase productivity and even reduce costs.



## The Age of the Customer

Having the right business communications solution for both internal and external communications is critical for SMBs because creating strong customer experiences is crucial to the future of their business.

Each and every customer is vitally important, and the loss of even one customer can be damaging. SMBs can't afford to have too many setbacks, and even a few unhappy customers can have long-term effects on the business.

Every company, regardless of size, needs to think strategically about their customers' experiences and how they are interacting with the customer. Even though SMBs often get numerous inbound customer calls or their sales reps are making many outgoing calls, they usually don't have formal contact centers or the necessary technologies to enable proper routing, queueing and reporting of customer interactions. In many cases, SMBs don't realize they could benefit from a contact center, although they know they need to interact with customers more efficiently.

SMBs that don't have the right tools and technologies are at a disadvantage, as providing a high level of customer service is a key competitive differentiator.

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## An Integrated Platform Expands Customer Care

Responsibility for effective management of customer relationships has expanded beyond the first point of contact, such as from the contact center to the accounts payable or sales departments. Servicing and engaging customers requires the right tools and technologies across the organization and should be part of an overall business communications strategy. With a fully integrated communications, collaboration and contact center solution, agents and subject matter experts located anywhere in the organization can seamlessly work together to answer customers' questions and solve their problems quickly, thereby increasing customer satisfaction and loyalty.

By streamlining the interaction between contact center agents and subject matter experts, organizations can tap into experience and expertise both inside and outside the business. Contact center agents can communicate and collaborate with individuals in various parts of the organization—whether sales, marketing or accounting—to better serve customers in real time.

Using presence capabilities, agents can see which subject matter experts are available and collaborate with the expert via phone, team messaging, web conferencing, screen sharing or video, regardless of where the expert resides. If the agent needs to transfer the call to someone else in a different group, the agent can see the availability status of other employees, send an instant message to the individual to let them know that they'll be getting a call, and route the call with a simple click of the mouse.

Agents can respond to customer queries in real time, increasing first contact resolution and customer satisfaction while also maximizing valuable agent time. Using screen sharing, agents can visually guide callers through a process, such as filling out a complicated tax form or using an online ordering system.



Take this example: small business owner John calls his local credit union about getting a loan for his new software startup. Bill, the customer service agent, isn't sure how to handle loans for startups, and sends a team message to a persistent workspace for a group of experts, inside and outside the company. Joan, a specialist in this area, is the first to respond. Joan gives Bill some information and suggests she also speak directly to John. Bill adds Joan to the call and initiates a web conference with document sharing, which lets Joan show John which forms to fill out and how to do it properly. John completes the transaction and is a happy customer. Bill is also a happy employee because he was able to provide first contact resolution and meet his customer's needs quickly, without having to waste time searching for information.

As another example, if a supervisor or manager sees that there are too many calls in queue, they can take advantage of the power and flexibility of the cloud to bring in other people to answer calls, even if they are working at home or in a different location.

With an integrated communication, collaboration and contact center platform, the benefits expand throughout the organization as individual workers can utilize the same tools to more easily communicate with each other and better serve customers. Whether it's a human resource department that handles questions about benefits, an accounts payable team that responds to inquiries about payments, or a sales team that needs to follow up on sales leads, a wide variety of groups and teams in every organization can benefit from an integrated business communications system with routing, inbound and outbound queueing, reporting and other contact center capabilities.







## “Doctors Don’t Stop Working”: Why National Physician Services Turned to the Cloud

As a small business with 30 employees, National Physician Services turned to 8x8 to help improve internal and external communications. National Physician Services is a healthcare IT services company delivering “end-to-end solutions for the healthcare industry in order to improve the delivery of healthcare through better information technology, applications and managed support.”

Established in 2001, National Physician Services delivers state-of-the-art enterprise technology services for physicians to optimize their workflows and improve patient care. According to Lee Seidman, Director of Technical Services at National Physician Services, “When we relocated our office to a different town, we needed to update our old phone system. We wanted something cost-effective that would also let us keep our phone numbers.”

Seidman noted that they looked at various options and chose 8x8’s cloud communications and contact center solutions because these provided the flexibility, mobility capabilities, cost and integrated cloud phone, messaging, meeting and contact center capabilities with analytics that they needed.

As an SMB, National Physician Services found that a cloud service was the right solution, providing many benefits.

**“With the cloud service, we didn’t have to put any equipment in-house, everything is managed in one spot and we can even manage the service from home if there’s a snowstorm.”**

– Lee Seidman  
Director of Technical Service, National Physician Services

The ability for employees to work from home or any location is particularly important. Based in the Greater Hartford, Connecticut region, National Physician Services often deals with snow storms, making it difficult for employees to physically get to the office if the parking lot or roads aren't plowed. "We start at 7 a.m. and if someone can't get into the building, there's a problem," Seidman said. "Doctors don't stop working—even if the doctor's office is shut down. People's lives depend on their ability to respond. We can't take a day off because of a snow storm." Each employee uses a single work number that can be reached anytime, anywhere via their desk phone, PC or mobile app. This allows calls to get routed to the appropriate support agent, regardless of where they're located. Being able to work remotely allows National Physician Services' support teams to continue serving customers while maintaining professionalism.

In addition to mobility, National Physician Services found several other key benefits that the cloud service provides:

- **Ability to look like a global enterprise:** With an integrated cloud communications and contact center service, National Physician Services finds that it can look like a large, global enterprise, helping it to better compete with larger players. "We rebranded ourselves as a national business and 8x8's services help us promote ourselves in more of a business mindset," Seidman said. Physician clients can call the company's 800 number, use the interactive voice recognition system to get routed to the appropriate individual or support team, and even get notified of where they are in the queue. Seidman noted, "Customers think they're calling a large business." He added, "With this service, you can be whatever you want to be—you can present yourself as large of an enterprise as you want. It helps create the illusion that you're just as big as large competitors. From the initial contact when people call us, they realize they're dealing with a real business."
- **Effective customer service:** Clients can interact with National Physician Services via phone, email and the web portal. With three different support teams—engineering, technical and application support—servicing physician clients, the support

reps can take phone calls remotely from wherever they are located. National Physician Services uses the same agents and a single support queue for phone calls, email and messaging through the company's web portal.

- **First contact resolution and call escalation:** In order to best serve clients, service reps can interact with subject matter experts or individuals in other service groups within the company to get the information they need. Using 8x8's chat capabilities, a service rep can check the availability of another individual in the organization and send an instant message asking for additional information to help provide service to the client. If necessary, the service rep can escalate the call and transfer it directly to the physician, rather than having to call the physician back at a later time, resulting in first contact resolution.
- **Scalability:** Seidman explained that if a physician group's network goes down, National Physician Services' contact center gets inundated with calls and emails, noting, "We can quickly add more people to answer calls with the click of a button. Instead of having to dial into the queue from within the office, our support reps can take calls on their laptop from wherever they are." He added, "Every second is imperative for good patient outcomes. We can get slammed with calls at 7 a.m., and being able to quickly add people from different teams or parts of the organization to triage calls when a critical situation arises provides our customers with the best possible service. They want to hear a live person, not a recording, and they definitely do not appreciate sitting in call-queue limbo waiting an indeterminate amount of time for someone to answer them."
- **Remote management:** Seidman touted the remote management capabilities offered by the cloud, explaining, "I don't have to be in the office to make changes. For example, if someone leaves the company, we can remotely deactivate their voicemail, change their password and forward their calls to someone else in the organization." This saves time and effort, making IT more efficient.





# Great Customer Interactions Require Great Communications Solutions

Great customer and employee experiences are based on great communications experiences, and these rely on having the right tools and technologies.

In the age of the cloud, it's easier—and more pragmatic—to get complete communications, collaboration and contact center capabilities in a single cloud-based service. When looking into new business communications systems, figure out what works best for your company. Oftentimes, a single vendor or platform solution is the best option. The key is to find ways to minimize the complexity while providing the best user experience.

## Ready for the Next Step?

Contact a Solutions Expert to learn more about how 8x8 can help improve both customer and employee engagement with a complete cloud solution for voice, video, chat and contact center. Call [1.866.879.8647](tel:18668798647) or visit [8x8.com](https://8x8.com).

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