aircall ebook

VoIP Phone Systems for SMBs

What Sales, Customer Support
& IT Leaders Need to Know

What's Inside

How to Choose the Right Modern Phone System

Today's modern phone system is a critical business tool that impacts the entire company. However, some individual teams will depend on it more than others. Sales and customer support staff cannot operate without reliable voice systems, and next-generation telephony platforms enable these teams to work more efficiently than those using plain old telephone service (POTS).

Besides the sales and support leaders who are looking for the most cutting edge technology for their teams, IT leaders have also become heavily involved in the tool selection process to ensure voice service is consistent, secure, and integrated with other mission-critical applications.

Next-generation phone systems that leverage cloud infrastructure provide much more than a dial tone. The biggest upside is the ability to integrate information from the call and call activity with CRM, sales, and customer support applications. In addition, managers can enhance call impact with real-time coaching, advance call queueing, and collaboration features. The latest telephony platforms are fully integrated components of a modern digital business, providing tremendous operational advantages that help teams delight customers and win deals.

Having powerful cloud-based tools are essential for both internal and client-facing business processes. Without a modern phone setup, a brand's customer experience (CX) isn't likely to measure up in a competitive space, and customers will go elsewhere. The same applies to ease of use amongst employees, particularly sales and customer support. If employees are blocked by the key technologies they use every day, like the phone system, frustration is inevitable and attrition rates will increase.

Administrative and finance teams benefit from a modern phone solution, too. Costs are lower, results are better, and the entire organization operates more efficiently. Best-in-class features and helpful integrations with everyday applications drive the business forward.

This guide will help sales, customer support, and IT leaders solve pain points when it comes to selecting a next-generation telephone system. In order for teams to solve their immediate problems, they must first make sure the solution fits their needs and those of the larger organization.

The Checklist for a Next-Generation Phone System for Sales, Customer Support, and IT

It's tempting to believe there is only one set of very generalized requirements that organizations should consider when choosing a modern phone system. The reality, however, is that to implement a solution that delivers all the desired benefits, organizations must evaluate each vendor in greater depth.

The most useful approach may be to consider each potential option from the perspective of the groups most impacted by it. For this reason, this buyer's guide will focus on the key features and capabilities necessary to empower each group.

Phone Solutions to Support Sales and Sales Management – What to Look For

For most sales teams, the single most important objective is closing deals. Digital telephony solutions that make it possible to close more sales at an increased rate and shorten the buying cycle are very attractive.

To achieve these goals, several functional capabilities must be combined. These features encompass much more than just the call; many of them focus on automation and more seamless processes that reduce the time salespeople waste on "administrivia" or manual tasks. Others focus on providing more training or information for the salesperson. The list of key questions sales leaders should ask include:

- Can the platform improve collaboration with teams to help sales succeed?

- Does the platform improve salesperson productivity?

- Are there integrations that enable your sales software and phone system to work together?

- Can the platform deliver analytics that provide critical insight?

- Does the technology improve culture, training, and personal growth?

The Answers Sales and Sales Management Should Look For

- **Improve collaboration among teams to drive sales success** – The days of the "lone wolf" sales approach are quickly passing. Sales reps benefit from the expertise and skills of other sales team members and departments. To support collaboration, a phone system must support shared inboxes, be able to add notes to a call that can be easily shared with others, and support call recording to allow others to hear the interaction first-hand.

- **Enhance sales productivity** – For many organizations, the single most effective way to increase revenue is to raise sales

productivity. A next-generation voice system increases productivity by automating manual tasks and enabling greater salesperson efficiency. Automation that includes key logging, automation of data entry into other apps, and call tagging gives salespeople more time to sell. And with "power dialing" capability, more prospects are turned into actual sales.

Voice system integration with core sales apps – The ability to automate and integrate the key apps that sales uses, along with call activity/data is the key to efficiency and empowering the sales team. A modern phone system should have pre-built integrations with apps such as Salesforce, HubSpot, Callingly, Teams, Outreach, Pipedrive, and Zendesk Sell. Strong integration capabilities deliver more seamless workflows and give sales more information about each prospect/customer.

Management analytics and reporting – Sales is a metric-driven process, and call data provides critical insights for understanding overall processes and individual activity. In many ways, the voice system can provide unique insights that inform higher-level metrics. For example, it is now possible to compare talk time to close rates or other steps in the sales pro-

cess and to compare the number/length of calls across the sales team to identify how to optimize activity.

Support an improved sales culture– The employee experience is critical to retaining or hiring capable staff, and this is doubly true for sales professionals. A next-generation phone system improves sales culture and delivers an improved employee experience. Advanced voice solutions will enable better and more specific training, using real conversations and interactions that make these coaching sessions more actionable. In addition, "call whispering," which is the ability for a manager or product expert to help a salesperson in real time during a call, provides an entirely new level of teamwork and support, as well as improves culture.

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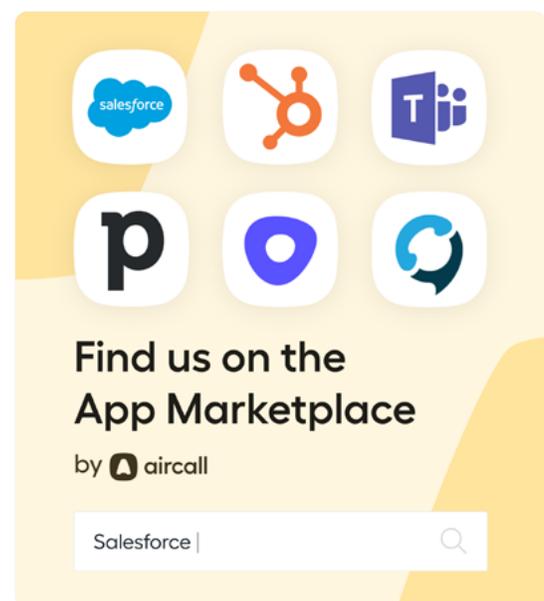
Phone Systems to Support Customer Service – What to Look For

In many respects, the quality, and capabilities of the voice platform that customer service reps (CSRs) use will determine how well they can support customers and prospects. Put simply, many legacy voice systems can't enable a positive CX, no matter how skilled or well-trained the CSRs may be. More importantly, as customers use different brands, they are quickly becoming aware that some have much more modern telephony platforms that not only improve CX, but also enable the CSR to provide far better service. This makes an upgraded phone solution essential, and there are important features/capabilities to look for, such as:

- Does the platform provide a better CX?

- Does the platform enhance the CSR's capabilities through integrations?

- Does the platform allow for better team collaboration?

- Are CSR processes more seamless and less siloed?

- Does the platform provide tools for better management?

The Answers Customer Support Management Should Look For

☆ **A platform that delivers better CX** – A next-generation service improves CX, allowing the CSR to drive a better overall experience. With such a service, repetitive input by customers is eliminated. Furthermore, before a customer speaks to a rep, intuitive and useful interactive voice response (IVR) capabilities and call tagging features allow the system to forward the call to specialists who can provide a better resolution the first time. And during a call, escalations or transfers can be done "warmly," where all the customer's information and details follow the call to the next agent. These all provide vastly better CX.

Provide enhanced capabilities and functions for the CSR – It is abundantly clear that many skilled and knowledgeable CSRs are limited by the voice system they use. That barrier to success must be eliminated. One of the most effective ways to do that is to integrate the phone system with the core apps that CSRs use. This eliminates downtime while a new app loads, as well as the time wasted re-entering information into another app. More importantly, the agent can use the information in the integrated apps to better serve the customer and understand their issues without having to ask. When contrasted with the common practice of screen and app switching, integrated workflows dramatically enhance what CSRs can do. With the right modern phone system, CSRs can now view a comprehensive set of information about the customer in real time and complete many more tasks without a lot of manual effort.

Improved collaboration – Many CSR teams have a limited ability to collaborate. This can be changed by using a new telephony service that enables better teamwork. For example, with skills-based call routing, it is possible to make the right transfer, or initially direct the call to a CSR that has specific skills. Using shared inboxes allows multiple CSRs to collaborate on a set of customers or a specific customer better and enables them to work across different schedules or to ensure follow-up. Finally, with shareable call recordings, it is possible for a CSR who is contacting a client in partnership with another CSR to hear the full conversation that occurred prior to their involvement.

See how CommonBond was able to better serve customers with the Aircall integration with HubSpot

See how HONK was better able to support their customers with their roadside assistance with the Aircall integration with Zendesk.

Seamless processes and improved workflow – One of the most common design flaws in legacy phone solutions is that each app or tool is separate and distinct from the other. As a result, workflows are not integrated, require regular re-entry of data, and impede productivity. A modern phone system should alleviate these

problems and to date the biggest obstacle here has been hard phones. The right cloud-based phone systems will fix the integration problem. Integrating voice with CRM, help desk, or tracking systems improves efficiencies, centralizes information and simplifies workflow. With the ability to integrate existing systems, it also becomes possible to pull relevant data out from every inbound call and use it across many aspects of the customer support process, eliminating the need for CSRs to have to manually track information across systems instead of in one seamless environment. And with automated call logging, CSRs can move to the next issue or call faster and without a delay, allowing a representative to get through more calls in one day, shortening wait time for other customers and improving overall satisfaction within the customer experience.

KUST😊MER + UNTUCKit

See how UNTUCKit drove success for their business with the Aircall integration with Kustomer

Inclusion of better management tools – The customer support management team will be better able to improve performance by using tools that deliver detailed analytics and activity by group or individual. Building accurate KPIs and using them to optimize processes is a hallmark of a successful CSR organization.

Phone Systems That Meet IT Requirements – What to Look For

As the telephony platform becomes an integrated component of the organization's digital "ecosystem," IT teams will become more involved and must ensure that the new platform meets their unique requirements. For IT then, the key issues to consider include:

- Does the new service support secure mobility and remote work?

- Are there easy-to-use and pre-built integrations with other core business apps?

- Can the system deliver the benefits of cloud ecosystems?

The Answers IT Teams Should Look For

Better support for secure mobility and remote work – The pandemic crisis has been a catalyst for what will be a long-term move to remote and virtual work and for some businesses, expanding into a distributed teams model. An organization's telephony platform must not only support remote work but enhance the ability to work remotely without security issues. Remote workers should be able to use the corporate voice system and have access to the same features they would have if in an office. The system must also support mobile phones, as the current practice of allowing employees to use their personal phones with no integration is creating numerous controls, security, and data privacy problems. With a cloud-based system, it becomes simple for employees to access the system from anywhere without IT having to worry about any additional resources beyond the computer the employee is already issued and an adjacent headset.

Large range of app integrations available – As organizations have "gone digital," one of IT's biggest challenges is bringing disparate and unique systems into a single cohesive whole. Application integration that enables information sharing is central to digital ecosystems that enable transformation. This has required tremendous effort on integration projects. A new telephony platform that already has many existing integrations that are

proven and working, and has open APIs, makes it much simpler for IT to integrate. For many IT teams, services that lack these integrations are immediately discounted and not considered a viable option.

Deliver the benefits of cloud economics – Cloud infrastructure now provides a more efficient and scalable alternative to on-premises infrastructure. But more importantly, as IT teams move away from a focus on the operation and administration of infrastructure and become a strategic partner with the business, cloud services have taken over the operational minutiae. IT teams now prefer cloud services, as they let them focus on being a better partner to the business and leverage the cost efficiencies of the cloud.

Summary and Key Takeaways

The phone system is a mission-critical business tool, particularly for sales and customer support teams. IT teams have become more involved as telephony transitions to a digital service and is already an integral part of the overall communication infrastructure. Unfortunately, many legacy systems were never designed to deliver what a successful business now needs, specifically the new features and functions that empower sales and customer support. Deploying a new voice platform that drives efficiency, improves workflows, and increases productivity is essential to growth and prosperity.

Aircall is an acknowledged leader in providing next-generation phone solutions that meet the needs of sales, customer support, and IT. The

Aircall voice platform answers all the questions posed in this buyer's guide in the affirmative. Aircall also provides renown implementation and support services. Further, Aircall's flexible cloud-based service can be tailored for any organization, of any kind.

So what's next? At Aircall we want to make the process as easy as possible for you. We believe a test drive is all you will need to see Aircall is the right tool for you! Not convinced?

See for yourself:

Get a Free Trial

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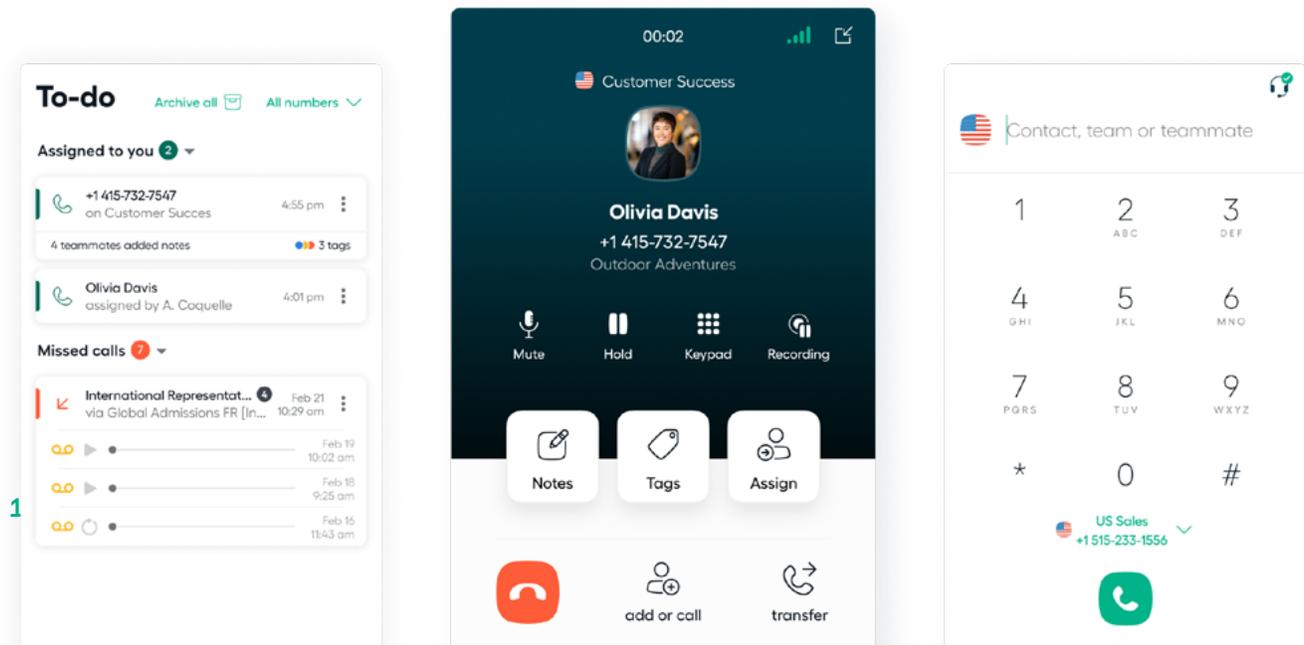
Additional Resources

The Complete Guide to Changing Your Phone System

Now that you're ready to make the switch, you might find our ebook *The Complete Guide to Changing Your Phone System Provider* a helpful step-by-step walkthrough on how to switch from your existing setup to a new provider:

Download the Guide →
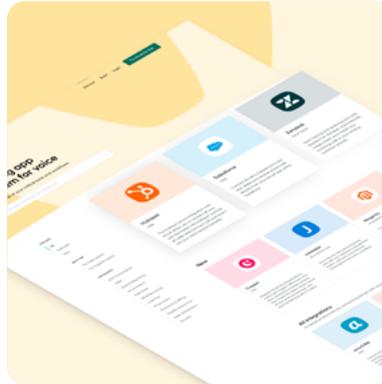
App Marketplace

Check out our App Marketplace to see if the platforms you are currently using integrate with Aircall.

Explore Our Apps! →

Aircall Developers

If the tools you are using aren't available as an integration, don't fret! We've got you covered with our public API. Just let a developer know your needs and the rest is magic!

Develop a New Integration Today! →