

Sales Guide

Customer Experience (CX)

CX SOLUTIONS ARE GROWING RAPIDLY

Instant communication favors collaboration, video conferencing, and messaging. Help your customers streamline their existing communication tech stack and reduce the friction from outdated systems.

On-premise to cloud market is only at 15-20% penetration, leaving a significant untapped market expected to grow to ~4B by 2028

CUSTOMER CHALLENGES

Common challenges faced by your customers and prospects and solutions to position against them.

CHALLENGE	SOLUTION
Outdated equipment	Companies need to automate and upgrade existing infrastructure and/or migrate workloads to the cloud.
Disjointed systems	Companies need to unify their multi-cloud environments and BYOD culture by integrating cloud communication & collaboration platforms.
Multiple locations	Distributed employees need a common communication experience, ensuring seamless connectivity regardless of user location.
Lack of skills & resources	In an effort to reduce OPEX, companies can outsource expertise to make CX purchasing decisions and maintain their infrastructure.



What does CX consist of?

MAIN COMPONENTS OF CUSTOMER EXPERIENCE

UCaaS	CCaaS	CPaaS
<p>Unified Communications as a Service</p> <p>Cloud-based platform for integrated communication tools, improving collaboration across locations.</p>	<p>Contact Center as a Service</p> <p>Cloud solution for customer contact centers with features like automatic call distribution and omnichannel support, to enhance customer service.</p>	<p>Communication Platform as a Service</p> <p>Extensible communications platforms that enable developers to leverage APIs to integrate into existing solutions or add features.</p>

SUB-CATEGORIES

Voice
Telephony
Video & Audio conferencing
Messaging
Mobility

Customer contact solutions
Employee experience
Omnichannel comms
Quality management
Performance management
Workforce engagement
Outbound interaction

Customization capabilities
Rich Communication Services
Multimedia
Communication APIs

Ideal for businesses seeking all-in-one communication and collaboration tools via a single cloud platform, boosting productivity and simplifying infrastructure.

Ideal for businesses handling high-volume customer interactions across channels, offering dedicated cloud platforms to enhance service, agent efficiency, and overall experience.

Ideal for businesses seeking to customize and embed communication features (voice, SMS, video) into their apps and gain control within their software.

ADDITIONAL CUSTOMER EXPERIENCE CAPABILITIES

Automation	Analytics	SMS	AI
<p>Self Service Data Exchange Business Process Workflow Repetitive Task Elimination Standardization Regulatory Compliance</p>	<p>Real-Time Historical Descriptive Diagnostic Predictive Prescriptive Cognitive</p>	<p>Marketing Alert Notification Event Management Support Sales Surveys Reminders 2FA Confirmations</p>	<p>Omnichannel Virtual Agent Agent Coaching Interaction Summary Sentiment Analysis Predictive Analytics</p>



Ask the right questions

Use these conversation starters to uncover basic customer communication needs, assess current communications systems, and understand long-term objectives. Frame your questions using the tiered approach below to cater to different levels of expertise.

01

UNDERSTANDING COMMUNICATION NEEDS

START THE CONVERSATION

- What are your main communication methods with customers (phone, SMS, webchat, etc.)?
- How satisfied are your customers with your current communication channels?
- What are your biggest challenges when communicating with customers?
- How many employees/seats do you have/need?
- How do those employees collaborate today? Microsoft Teams, Google Workspaces, Zoom, Slack, other?

UNCOVER THEIR NEEDS

- How do you measure the impact of different communication channels on customer satisfaction?
- What are your long-term goals for improving customer communication?
- What challenges do you have integrating different communication or CRM systems?
- Please describe any compliance requirements that you may have.

02

ASSESSING CURRENT SYSTEMS

START THE CONVERSATION

- What communication tools and platforms do you use today?
- Do you have a contract with a service provider? If so, when is the contract up?
- If using PBX, when is your PBX up for renewal/update/EOL?
- What are your biggest frustrations or limitations with your current communication systems?

UNCOVER THEIR NEEDS

- In an ideal world, what would your communication systems be able to do that they can't currently do?
- What are your experiences with managing and maintaining your communication systems?
- What are your biggest concerns or apprehensions about adopting new communication solutions?



03

UNDERSTANDING LONG-TERM OBJECTIVES

START THE CONVERSATION

- How does this project impact your overall customer experience strategy?
- Are there any emerging communication technologies you're interested in exploring?
- What specific data or insights do you currently lack to make informed decisions about communication?

UNCOVER THEIR NEEDS

- How do you envision your communication platform evolving to support your growth and expansion plans?
- What metrics do you use to measure the effectiveness of your communication efforts?

BONUS QUESTIONS

- Can you share an example of a company that has impressed you with their communication strategy?
- How do you see AI and automation playing a role in your future communication strategy?

After you've assessed if your customer would benefit from a CX solution, your Channel Manager can connect you with a Sales Engineer to help find a solution.

SAMPLE VERTICALS

- ✓ **Real Estate** is a great example of remote work as workers are out on the field most of the time. CX provides multiple ways of communicating with staff that are on the road and tracking them as well.
- ✓ **Retail** also uses CX to remain operationally lean i.e. you won't find phones all around the store, but need the flexibility and mobility UCaaS brings to the table.



Overcome objections

Here are some common objections and example responses that you can use to address your customer's concerns and hesitations.

"My company uses an on-prem PBX. I don't think cloud solutions fit my needs."

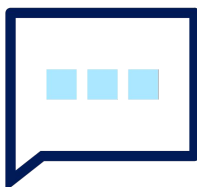
Would you be open to us comparing the costs of a cloud solution versus upgrading or maintaining your on-premises solutions?

"Our phone systems aren't going anywhere, I'm not sure how well that will work with cloud tools."

Cloud-based Customer Experience solutions are built to integrate into PBX solutions; they're meant to co-exist.

"There are too many CX options to choose from."

We have technical experts that can help you evaluate your best options against your business needs, you don't have to do it alone.



"Will a CX solution complicate my team's life?"

CX platforms are built to give you access to the entire platform and are user-friendly, allowing you to make changes easily.

"Our teams are already too busy; we can't introduce CX solutions."

88% of customers expect self-service experiences, so they're open to absorbing part of that work. The right CX solution(s) can save your teams a lot of time by automating aspects of the support process.

"I'm happy with my current strategy, why would I add cost?"

69% of customers expect connected experiences. Are you open to discussing your digital roadmap to meet customers where they want to buy?



Use Microsoft Teams to supercharge CX solutions

01

Use Voice Integration

Teams works with comprehensive voice calling solutions like Microsoft Calling Plans, Direct Routing, and Operator Connect, and the providers listed below.

Voice integration within Teams

BCM One (PureIP)
CallTower
Sinch
NuWave
Momentum

02

Connect PBX Infrastructure

Existing PBX systems can also connect to Teams through a SIP trunk or using one of the dedicated UCaaS providers below.

Voice, collaboration, and communication within Teams

RingCentral
Zoom
Vonage
Nextiva



03

Compare solutions

Our Sales Engineers and Microsoft Specialists can evaluate your customer's business and provide a comprehensive solution against their calling and communication needs.

04

Support their implementation

Implementing a solution like Teams with voice integration might require technical expertise. We can offer guidance and support in navigating these options.



Top solutions to offer

ALL THE LEADING CX PROVIDERS



AppDirect has helped millions of subscribers on their digital journey

14K

customers migrated to cloud productivity tools

96%

of customer support calls resolved on the first call

100K

annual calls providing user help desk support

93%

customers rate us highly for onboarding and end-user support services

Contact your Channel Manager for more information about our CX solutions—our team of experts will guide you on the best path forward

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