

# Switchvox for the Professional Services Industry

Powerful Unified Communications  
for Your Firm, Practice, or Agency





# INTRODUCTION

Professional services firms face unique challenges in today's marketplace. Whether your firm offers legal, financial, technical, or other consulting services, the number one goal is to offer high-quality and unique client services to ensure long-term success. Forrester research shows that 55% of customers would pay more for high-quality customer service. With this increasingly demanding and educated client base, one that is willing to pay for premium customer service, it forces your firm to not only offer the most innovative and modern services available, but to ensure the client experience is consistent. Otherwise, you risk losing significant business to a more customer-centric competitor.

As a service firm, you must also adapt to changing work environment options in order to compete for new talent, as well as retain top performers. The next generation of talented accountants, lawyers, architects, and engineers are entering the workforce with the expectation that your firm will offer flexible work options. Not having these options puts your firm at a disadvantage when recruiting this new talent, and could mean losing current star employees to your competition.

Often, you must not only compete with other top firms in your field for business and talent, but must do so on shoestring budgets that have been brought on by shrinking margins and price pressure. As a service firm, you must ensure that every measure is taken to reduce existing costs and to make sound economic decisions with new purchases and ventures.

Unified Communications (UC) and Switchvox provide your firm the ability to be industry leaders, not only in client relationships and revenue, but in employee satisfaction and new talent recruitment.

Switchvox, Digium's award-winning UC system provides professional services firms the features needed to be a competitive, customer-centric business. With its robust, all-inclusive feature set, including mobility, simple yet advanced call routing, and collaboration, Switchvox is widely considered the best value in UC for professional service firms.

## **Switchvox addresses several common problems including:**

- Improves Client Interactions
- Assists with Retaining and Recruiting Top Talent
- Provides Mobility Options
- Reduces Costs

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## IMPROVE CLIENT INTERACTIONS

### Let's take a closer look at how Switchvox can change the way your firm communicates.

It's already been established that the top priority of any professional services firm is to offer high-quality services to your client base. The skills and abilities of your team can only be put on display if you are able to attract and keep clients. A 2013 study by Forrester shows that consumers are four times more likely to use a competitor's service due to bad customer service, even over actual product problems. Today's consumer has more choices than ever, and in order to set yourself apart from the competition and grow business, your firm must create a high quality, client-centric experience. That experience starts with your communications system.

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*Switchvox gives  
your firm complete  
control of the client  
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### Ensure Successful First Impressions

"You never get a second chance to make a first impression." While the source of this quote is unknown, its accuracy has been well proven. Your firm's reputation can be shaped and influenced within the first few seconds of a phone call being answered. Often, the initial handling of calls occurs based on routing procedures and IVRs (interactive voice response messages) from your company's phone system .

Switchvox gives your firm complete control of the client experience right from the start. You decide exactly what IVR messages your clients and potential clients hear from the time they first connect, to the time they hang up. You can play announcements, advertisements, your favorite music, or whatever message you see fit.

Not only do you control the messaging, you control the options that your clients can access. With the Switchvox IVR, you can create easy to follow and logical menus for your callers to use. The IVR can function as a simple auto attendant; or it can be fully customized to handle more complex applications, such as creating a phone system-based payment system. If you prefer a more personal touch, you can set up routing so that your callers are directly connected to an available member of your staff.



## IMPROVE CLIENT INTERACTIONS cont'd

### Ensure Clients Connect to the Correct Person the First Time

Switchvox provides easy to set up call routing so that your clients connect to the correct team member quickly and efficiently. Switchvox provides unlimited call queues that allow you to group employees together and have incoming calls ring all of them at once, or ring them in a way that works best for your firm. This allows your clients to always connect to the right staff member, with or without the assistance of a receptionist.

Switchvox also provides mobility applications that allow your staff to take and make calls from anywhere. This makes key staff members available to your clients, regardless of whether or not they are in the office. Even better, because all mobile calls are routed through Switchvox, clients always see your organization's Caller ID, and not that of a staff member's personal cell phone number. This small detail goes a long way in providing a consistent, professional customer experience.

### Deliver Client Information On Demand

Switchvox provides the tools necessary to easily connect and integrate with third-party CRM systems and client databases. These tools are then able to provide valuable client information to your staff before the call is even answered. Imagine if your staff not only knew who was calling, but immediately had visibility into any notes (or other critical information) about that specific client before ever being connected on a call. This information reduces time spent on the phone asking for basic information and reduces customer frustration from having to repeat information as they get transferred between individuals.

Successful leaders understand that recruiting, nurturing, and retaining top talent is the key to a successful organization. Today's worker, especially the new generation of talent coming out of universities and grad schools, understands the value of having flexible work options. Flexibility is often a key factor in making career decisions.

# RETAIN AND RECRUIT TOP TALENT



## Flexible Work Options

Switchvox is completely web-based, giving your staff access to its robust feature set from anywhere that there is an Internet connection. This is not only at the user level, but for an administrator as well. Being web-based also eliminates the need to be concerned about compatibility issues, because Switchvox works on both Mac and PC and in all the major web browsers.

Switchvox's powerful user productivity tool, Switchboard, gives all users the ability to get a bird's-eye view into your phone system, as well as have call control from their computer. Being web-based also means it is easy for anyone within your firm, even the receptionist, to work from home, or from any remote location. Your staff can make calls, receive calls, view the status of all other employees and much more, from anywhere!

If you want to provide your team with the ability to work outside the office and ensure productivity, Switchvox is the key.

## Simple and Easy to Use System

Another factor in retaining top talent is to provide powerful, yet simple-to-use systems to improve efficiency and reduce frustration. Robust features are great, but they must be simple to use or your team members will not adopt them. Switchvox is well known in the UC industry for being incredibly easy to use for all types of organizations, including professional service firms. The interfaces in Switchvox are managed with simple drop down menus and quick links for both the users and administrators. Switchvox does away with complex scripting and coding to set up even the most intricate feature. And if you get stuck, the help function is inline in the interface. No searching company websites or bookshelves for manuals is required.

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*Switchvox's robust features improve efficiency and reduce frustration.*

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# MOBILITY

Today's worker is always on the go and the smartphone has become an essential connector between work life and personal life. A 2013 Experian report stated that, on average, US workers spend over an hour a day on their smartphones. Whether you're a road warrior, going from city to city to conduct business, or you just need to stay connected while temporarily away from the office, having ways to integrate your smartphone with your office communications has become an absolute necessity. Switchvox provides the tools to keep both you and your staff productive, even when outside the office.

## Several Phones, Just One You

Fixed Mobile Convergence (FMC) allows your team the ability to connect all of their personal phones to an office extension. This gives employees access to a powerful In Call Menu that frees them from their desks and allows clients or other team members to reach them via a single number. No more having to chase employees down through multiple numbers. Plus, FMC means it's easy to transfer calls from one device to another and record calls right from any cell phone!

## Switchvox Mobile

Switchvox Mobile gives workers true business mobility. Available for iPhone®, Android®, and Blackberry®, Switchvox Mobile allows your on-the-go staff members the ability to make calls from their mobile devices and have their callers see only your organization's Caller ID. This helps keep a staff member's personal number private. And it provides a consistent, professional experience for your clients. You can also check voicemail, activate call rules, touch-dial from the directory and more with this free mobile application, included with every extension.

## Untether Your Staff from their Desk

Switchvox FMC means your staff members no longer have to be tethered to their desks. With a simple click of a button, they can move calls seamlessly from one device to another, whether it's from a desk phone or head set to a mobile phone. On a long call at your desk and need to leave the office? Just press a button, move the call to your cell, and finish the call in your car. It's that simple.

Price pressures and reduced margins caused by the ever increasing competitive nature of the professional services industry are forcing firms to make smarter and more economical decisions regarding current costs and future spending. Switchvox is the perfect option in this challenging economic climate.



# COST SAVINGS

## Best Value in UC

Switchvox has been named the best value in UC by leading industry analysts. Complete Switchvox systems can oftentimes be purchased for what most firms are paying in yearly support costs from traditional phone systems. With the added cost savings that VoIP or SIP trunking can provide, Switchvox customers all over the world are saving as much as 70% off their monthly telephony service costs.

## All Features Included

Switchvox offers a unique pricing model for the UC industry in that every feature is included for every user. No longer do you have to make decisions on how many feature licenses are needed; nor do you have to pay more money down the road when a user needs to add a feature to their extension, like call recording, conferencing, or mobility. With Switchvox, all you have to do is turn the feature on or off as needed. It's really that simple – and that affordable.

## Flexible Deployment Options

Switchvox can be deployed in whichever way is best for your firm. Whether you want the flexibility, scalability and control of an on-premises deployment; or the low monthly payment, ease of management, and simplicity of Switchvox Cloud; or you require Switchvox Hybrid, a flexible combination of a hosted VoIP and premises-based solution. Switchvox provides the deployment method that fits best for your individual need.

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# CONCLUSION

A 2014 report from First Research indicates an organization's future business growth relies heavily on a firm's reputation. Protecting an organization's reputation is one of the key challenges that professional services firms face today. Reputation for your firm is built over a long period, but can be damaged with a single negative client interaction, and it is costly and time consuming to repair. Your communications system is your link to your customers and it has a significant impact on your reputation.



As discussed in this guide, Switchvox provides the tools and systems to ensure that your firm can compete in a highly competitive industry. While also reducing costs, Switchvox helps improve interactions with your clients, recruit and maintain top talent, and provide more mobility and flexibility.

Discover for yourself how Switchvox, Switchvox Cloud, or Switchvox Hybrid can change the way your firm communicates.



## We're changing the way businesses communicate.

Founded in 1999, Digium is the creator and primary developer of Asterisk, the industry's first open source telephony platform. More than one million customers in 125 countries have deployed Asterisk-based systems. Digium is committed to ending the days of expensive, proprietary telecom. The Switchvox family of Unified Communications solutions is built on Asterisk and is designed to provide enterprise class features at affordable prices for small and medium businesses. The award-winning line of Switchvox IP PBX phone systems provides more than a phone system – it delivers a Unified Communications platform that integrates multiple features that increase productivity and lower monthly communication costs. It's the affordable solution with a proven return on investment for businesses with 10 to 400 users.

**Learn more at [digium.com/switchvox](http://digium.com/switchvox)**

### **Want more information on Switchvox?**

Take a virtual tour of this powerful Unified Communications platform:  
**[www.digium.com/switchvox](http://www.digium.com/switchvox)**

### **Contact us – we're here to help.**

Talk with a Switchvox specialist:  
**1 877 344 4861**  
**1 256 428 6271**  
**[sales@digium.com](mailto:sales@digium.com)**