One Company's Move to Cloud-based Voice Communications: How they Boosted Productivity

There is so much ingenuity and effort that goes into launching a great business, but that hard work is just the starting point. Building your business for the long-term relies heavily on your ability to communicate with clients and team members efficiently and effectively, especially in today's world. But what is the best way to do that? With ever-changing technology and new tools emerging constantly, it can be difficult to keep up. Unified Communications as a Service (UCaaS) is a cloud-based alternative to on-premise phone equipment that leaves a business leader hard pressed to find a downside. Among the many features of UCaaS, an organization can expect to receive telephony, instant messaging, artificial intelligence with call routing, video/audio conferencing, and better security, all in one environment. AND, with substantially reduced costs than traditional systems. Your staff will find UCaaS platforms far more user friendly and will level-up your customer service. As much as we'd love to go on in detail about all the incredible scalability, easy onboarding, detailed analytics, remote work capabilities, heightened customer experiences and every other benefit of Unified Communications, that is not the true purpose of this article.

Recently we teamed up with Dialpad, one of the best platform providers, for a live webinar to share some of the newest advances in UCaaS technology. As a special bonus, Mike Monteiro, Business Operations Manager of Education First (EF) joined us to share his organization's experience as an actual Dialpad client. He offered a multitude of specific examples of how UCaaS has boosted their business and made life easier for their many users. For more general information on Unified Communications though, you can read about it right here. Otherwise, keep reading to learn more about UCaaS done the Dialpad way!

Ready for Some Client LOVE?

Education First (EF) is an international education company specializing in academic degree programs, language training, educational travel and cultural exchange. To say they have a need for an expansive inbound and outbound global Contact Center would be a huge understatement. As Business Operations Manager, Mike Monteiro is responsible for all of their telecommunications and has seen it all. For many years, Mike maintained EF's own Private Branch Exchange (PBX) phone systems which meant learning how to bypass most of the system's quirks and taught employees how to use what was becoming an antiquated system. Even something as seemingly simple as changing an outgoing voicemail message to alert clients they were heading out of town absorbed a fair amount of his attention. On top of that, it only took one wrong click to severely disrupt the entire system and possibly shut it all down. Many agents just stopped trying to update their voicemail at all, which led to unanswered calls and a poor customer experience (CX). So, when their existing PBX needed an expensive mandatory upgrade, EF found themselves rethinking everything.

How EF Chose Dialpad

When faced with the pending PBX upgrade, the first question for EF was, will this offer any additional benefits or tools that might iron out some of their ongoing user issues? Nope, not at all. This costly upgrade was solely for the purpose of keeping the system stable so they could keep operating as usual. EF would have to continue to manage their own hardware (which Mike really didn't want to do) and hope that they didn't grow beyond its capacity before their IT budget could handle another substantial investment. This deliberation led to the obvious next question. What about a cloud-based platform? Mike and his team began thoroughly researching several companies and found that from an administrative and user perspective, Dialpad was much more advanced than most others out there. Even though they were still building their Call Center as a Service (CSaaS) product, they were committed to having all the features Mike was looking for by the date everything would need to be converted over. EF decided to take the leap and as promised, Dialpad had more UCaaS tools than they bargained for, right on time.

First Impressions

"From the very start, we noticed immediate benefits with our new Unified Communications platform. First of all, just getting a new employee set up with a number, voicemail, call recording and ready to take calls used to require going to four separate systems, as well as involving our IT team. Even though we had gotten the old PBX process down to 10 minutes, we were happily surprised when a

lone manager could get it done by going to just one place, and the set up time was reduced by 90 percent."

Mike Monteiro, Business Operations Manager; Education First

EF's management team was instantly blown away by how user friendly Dialpad's platform was. Their previous PBX system had every department within it, which forced EF to actively limit user access so they couldn't accidently sabotage somebody else by making changes. With Dialpad, each product is separated by department offices where managers can easily add their own users. Mike saw immediately how much time and how many headaches this feature alone saved his management team. Just these few benefits they noticed right away were game changers in terms of saving time and increasing productivity. Of course, that was just the beginning.

Scheduling Made Easier

One feature EF's managers absolutely love is their ability to fully understand how the new call centers work with detailed analytics to give real-time feedback. This way they can look back and see when peak call hours are actually happening rather than making scheduling decisions based on flawed assumptions. From there, management is able to independently make informed changes in agent hours, call routing, when to plan projects, and messaging. It has also helped them arrange the best time to close for team meetings and change hours with a recorded message at a moment's notice. With the old PBX system, they had to put in a request to their internal IT team and schedule it well in advance. Dialpad's platform allowed them to choose the best meeting time based on their own real data and handle rerouting their inbound calls at a moment's notice without involving IT.

"The old PBX system made scheduling very complicated and often it came down to a lot of guessing on the part of our managers. For example, regular meetings are necessary for our various call center teams but finding a good time to take them offline was difficult. Even when that decision was made, it took at least a week to arrange it with our IT department. That all changed with the Dialpad platform."

Mike Monteiro, Business Operations Manager; Education First

Bringing Better CX than EVER

Beyond the novelty of the cool new headsets, EF's customer service team was thrilled to have all of the communication tools in one place. Just being able to

instantly pull up previous messages while talking to customers allowed reps to see their whole history and pick up where they'd left off. That was a huge boost to creating more positive CX overall. Plus, with the previous system, if a team member had to deliver a bulk voicemail to a large population of customers, they'd have to spend hours repeating the same message to each number dialed. With Dialpad, they could record one consistent message and hang up as soon as the call was picked up with confidence the system would handle it from there. The time saved was huge and freed them up to handle other customer needs if necessary. Which brings us to another favorite EF feature.

"Often, our customer service reps work on projects when they aren't scheduled to take calls, but we need them to be available as backup. With the old PBX system, it was difficult to monitor when we should have them jump on a call. Of course, Dialpad thought of that and designed an alert feature to notify reps when certain preset thresholds were met. That way they knew instantly when to get on calls. There are far too many ways our customer service teams have benefited from CCaaS to mention, but everyone goes home with less overall work stress at the end of the day."

Mike Monteiro, Business Operations Manager; Education First

Empowering Higher Sales

Just as those employees tasked with handling customer issues found specific CCaaS benefits for their work day, so have EF's sales agents. Of course, sales involves a completely different skill set and their agents undergo continuous training to close more deals. They've found the best way to approach coaching in phone sales is to draw from actual recordings of an agent's conversations with potential customers. In the past, it could take a manager 2-3 hours of listening to calls just to find a handful of examples for a single representative. As a result, one-on-one agent meetings were spaced out bimonthly to give trainers enough time to prepare. With Dialpad, keyword search capabilities and Voice Intelligence features changed everything. Now a coach can just run a basic search and find plenty of training opportunities for review with their respective sales agents. Even better, once certain challenges are identified, managers can set on-screen pop ups when Vi detects certain sentiments or objections. That way they never have to put future clients on hold or call back and risk losing a potential sale. So much more can be said about how much increased productivity EF has seen as a direct result of the Dialpad platform, but you get the idea.

"I can't say enough about the increased productivity of our sales teams. Dialpad's Vi feature is so helpful for reps when handling objections because the platform actually hears it and automatically prompts the appropriate response. Vi has been especially helpful with new team members who may have less experience with inbound sales calls. This is the kind of incredible technology that sets Dialpad apart."

Mike Monteiro, Business Operations Manager; Education First

Ready for Remote Work

So many businesses were hit hard having to figure out how to send their staff home to work full-time when Covid-19 hit. Fortunately, EF was already prepared for a pandemic without even knowing beforehand. That was entirely thanks to Dialpad UCaaS. Prior to the pandemic, some of their agents were tasked with making on-site visits, and would lose opportunities to connect with clients while in the field. Even if they could access client information and messages, they didn't want to risk giving out personal contact information by using their cell phones. Most often, agents would block their number, and we all know how successful it can be to get people to answer unknown callers. With the Dialpad app, staff could make calls from their mobile devices that appeared to be coming from the office. That took client care on the road to a whole new level. Later, when faced with the stark reality that the entire EF team needed to shift to remote work, they were ready for it. Even with everyone working from home, the Dialpad platform was able to handle their call volume and still provide all of their favorite features. EF's previous PBX system would never have been able to do that.

"I cannot express how much working with Dialpad has made my job easier. With a more self-reliant staff, I've been able to focus on improving workflow in other ways. No longer do I get asked how to change a voicemail message or any other of the mundane tasks made simpler with such a sophisticated UCaaS platform. What's even better is Dialpad is always building new features that continue to impress. To say the least, EF believes we made the absolute right decision to move our contact center to the cloud, and Dialpad was the right company for us."

Mike Monteiro, Business Operations Manager; Education First

Why We LOVE Dialpad Too

There are plenty of companies on the market offering UCaaS platforms but Dialpad is in a class all its own. This isn't by chance or happenstance. Dialpad

actively surveys their own customers to find ways to advance their services. They want to know what is working and what could be improved upon so they can design and implement new innovative features to make the standard Unified Communications experience exceptional. This approach to UCaaS has revolutionized the industry which is why over 70,000 companies trust Dialpad with their brand reputation every day. They have received many accolades for their premier Unified Communications platform including being ranked a Voice Over Internet Protocol (VoIP) leader by G2 in their annual [Grid Report](#). There is no organization too large or too small for Dialpad's platform because it can scale up or down in real time to meet your needs, which saves you money. So, whether your number of users and desired features seem limited or massive, they have the right solutions for you.

How Dialpad Does it

Dialpad is leading the way by providing some of the most sophisticated features of any Unified Communications provider. While a few of these products are outside the wheel house for some organizations, there is something for every business or practice in this lineup. Their focus is to offer every possible UCaaS feature so you can tailor your platform to serve your business best. Below is a short overview of each of their innovative product lines.

- **Talk**

  Every organization needs a reliable phone system to keep the lines of communication flowing no matter what. Dialpad Talk offers cloud technology with an easy to use desktop interface that empowers remote workers with a single environment for business conversations, wherever they are. That means you can use your own smart devices or desktop phones and, when in need, other necessary hardware is included. AI-powered Voice Intelligence (Vi) takes each call to the next level by providing real-time, shareable transcripts and organized notes so you can focus on the conversation. With more features than ever dreamed by the average user, there's no limit to your ability to streamline your work calls.

- **UberConference**

  Remote video and web conferencing have become a staple for team collaboration and are here to stay. What you may not realize is how much more productive they can be with a little added ingenuity. The same Vi technology mentioned in Talk really shines for video conferencing by generating an automatic meeting summary with key action items. Your team

will never again leave a meeting unsure of their next steps. Dialpad software can be integrated with Google Calendar or Office 365 to schedule meetings in just one click. Plus, you are fully in control of your meetings with the ability to work with other moderators, mute attendees, share screens and lock the meeting for added security.

- **Contact Center**

  In the world of sales and service, there is often a need for a contact center to handle incoming and outbound calls. Dialpad's CCaaS brings all the most innovative features to any organization's consumer relations. For connecting with potential and existing clients, an outbound dialer and Customer Relationship Management (CRM) integrations will allow you to focus on the person rather than complicated tools. The Omnichannel feature allows customers to seek support through multiple avenues and leave a trail of information agents can access to avoid repetitive questions. Of course, Vi technology is helpful here as well with the ability to detect customer sentiments and instantly alert a manager if a call is heading in the wrong direction. These and so many more perks of Dialpad CCaaS make it an international favorite.

- **Sell**

  Dialpad offers the only system built specifically for sales so, if your organization is driven by the need to close deals, this is the platform for you. It allows sales reps to work remotely from their own devices which has proven itself to be a necessary option. New employees are able to get onboarded quickly with features that ramp up training time and get them on prospect calls sooner. This is done in part with real-time AI coaching that can give you tips on how to steady your new agent's voice and resist talking too much. Vi is there for you once again with keyword prompted objection handling pop-ups. Plus, all your data is connected and easy to access so nobody gets overwhelmed with too many tools. Since these are just a few of Dialpad's incredible Sell features, there is no better platform for you.

In Closing

We are so thrilled for the opportunity to bring some attention to a few of the incredible innovations Dialpad's cloud-based Unified Communications has to offer. LightPoint has the privilege of working hand-in-hand with them to extend these services to our clients. We can help you choose the right UCaaS platform for your business. Whether partnering with a small law firm or a large healthcare

practice (and everything in between) a UCaaS platform can take any business to the next level. For more information, contact LightPoint today!

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