



3 Step Plan: Customer Communications for Business Growth



**BUILT FOR
VALUE, EASE OF
USE & SCALE**

330M connections
annual connections
for access & support



1B people
On calls, meetings, chat,
webinars and training annually



Trusted by nearly **1 MILLION** companies.



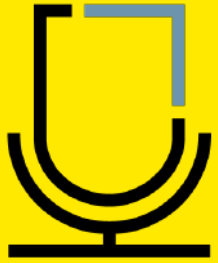
Today's Presenters



Adam Peeler
Director, Product
Management, GoTo



Michael McCann
Senior Manager,
Product Marketing, GoTo



What's on the agenda?

Real talk. Real examples. Strategies for growth.

Step 1: Assessing 6 warning signs you need an upgrade

Step 2: Building the business case to modernize

Step 3: Determining where to start for the best ROI

Q&A

Growth is powered by happier customers

61%

of customers who need assistance prefer to speak to someone over the phone¹

62%

of customers enjoy interacting with brands on multiple digital channels²

65%

of businesses spent more on customer comms tech last year than the year before³



Poll Question:

What's your biggest phone and customer communications concern?

- a. Not meeting customer expectations
- b. Missing out on AI/advanced automation
- c. Need better reporting and analytics
- d. Current systems don't scale/integrate
- e. Overhead and costly maintenance



1. Six Warning Signs your Phone & Customer Comms need an upgrade



Real Example: Veterinary Clinic



The Primary Warning Signs

1. CX	2. Reporting	3. Scalability
Missed calls Playing phone tag Routing from different clinics became an issue	Wait times/Abandoning Clinic capacity Avg call handling time	Centralized approach Needed more licenses Needed Contact Center capability


“We get hundreds of phone calls a day — and we have multiple clinic sites, which leads to a lot of missed calls. We realized there had to be a better way.”

Nicole Hash
Operations Team Lead




6 warning signs you need an upgrade

1 Customer Expectations




- Limited Channels
- Overwhelmed System
- Lack of key features

2 AI & Automation



- Sentiment Analysis
- Call Routing / IVR
- Conversation Summaries

3 Remote Support




- Softphone
- Mobile Apps
- Access to Data

4 Reporting & Insights




- Avg Time to Answer
- Peak Call Times
- Audio Quality

5 Scalability



- Cost efficiency
- Competitive Advantage
- Future Proofing

6 Costs & Maintenance



- Extra \$\$\$ for New Features
- Unpredictable Billings
- System still “Good Enough”



2. The Business Case to Modernize Your Tech Stack



The latest communications software drives business growth



Financial Services/Consulting | 1 Location | 60 Employees



1. Smoother Customer Experiences

- ✓ One Single Platform
- ✓ Multi-channel approach
- ✓ Easy access to customer data
- ✓ Ability to personalize



2. Reduce the Burden on IT

- ✓ Reduce repetitive IT tasks
- ✓ Consolidate admin in one view
- ✓ No maintenance, fully secure
- ✓ No hardware to manage



3. Maximize ROI

- Staff Productivity/Customer Satisfaction
- Reduce licenses costs
- Reduce need for hardware
- Limit downtime & add SLAs

Building the Business Case for Modernization



The 5 key benefits from upgrading your business communications



**1. Smoother
CX**

**2. Reduce IT
Burden**

**3. Maximize
ROI**

4. Insights & Performance

- ✓ Identify top performer
- ✓ Scheduling assistance
- ✓ Identify breakdowns
- ✓ AI analysis + Survey tools

5. Flexibility & Scalability

- ✓ Robust mobile app
- ✓ Cloud-based – easy to add
- ✓ Ongoing updates & R&D
- ✓ No business disruption



**How long can you afford
to put off investing in
your business
communications?**

Poll Question:

What's the biggest barrier to upgrading your business communications?

- a. Unclear on the ROI
- b. Switching concerns
- c. Lack of in-house IT expertise
- d. End user's pushback
- e. Lack of budget



3. Where to begin: Assessing your current setup



Where to start

1

**Talk to your
internal teams**

2

**Gather customer
feedback**

3

**Reach outside
your business**

4

**Check out the
competition**

5

**Do your online
research**

GoTo

Real Example: Automotive

Getting Started

1. Talk to your teams	2. Gather Customer feedback	3. Check out the competition
<p>Lack of mobility</p> <p>Excessive time spent directing callers</p> <p>Lack of necessary reporting</p>	<p>Unanswered phone calls</p> <p>Repeatedly explaining questions when transferred</p> <p>Unable to text main business number</p>	<p>Competitors offer diverse contact methods</p> <p>Automation to flip between channels</p>

"We had 5 numbers and we never knew why someone was calling. People weren't answering the calls, things were being redirected, and consequently, a lot of customer calls weren't being answered."



How to get the best ROI

The right communications system for your business helps you maximize your return on investment continuously for years to come. Here are a few keys to building great ROI:



Encourage adoption

- Ensure all paid licenses are assigned and all users onboarded.
- Give everybody the training they need.
- Integrate the software with staff productivity platforms.
- Implement advanced capabilities like interactive voice responses, call routing and auto attendants.



Get user feedback

- Find out if any customer data is difficult to access.
- Identify glitches and performance breakdowns.
- Make sure you're using AI features.
- Look for high-powered features that are going unused.



Measure outcomes

- Data should point to reduced IT support calls.
- Customer satisfaction metrics should be easy to identify.



GoTo Can Help

If you're feeling ready, our experts are ready for you!

Learn more about how we can help you modernize your business communications.





Poll Question:

Would you like to speak to a GoTo expert?

- a. Yes
- b. Not at this time



Thank you.

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1M (nearly)

businesses
partner
with GoTo



Best Value for Price
Best Features
Most Loved 2022



Challenger for Meeting Solutions
Challenger for UCaaS Solutions
Customers' Choice for Meeting Solutions



Highest Adoption
Best Results
Most Implementable



Best Customer Service
& CRM Product



Customer Service
Company of the Year