



Customer Experience Check List: Is Your Business Phone System Delivering?

IN TODAY'S COMPETITIVE LANDSCAPE, EXCEPTIONAL CUSTOMER EXPERIENCE (CX) IS NO LONGER A LUXURY – IT'S A DEFINING FACTOR FOR BUSINESSES.

But what exactly constitutes a great CX and how do you know if your business phone system is helping or hindering that experience? This datasheet is designed to help you understand the elements of a great CX and determine whether your business phone system is meeting your customers' expectations.

Review the following characteristics of a great CX and the subsequent series of questions and mark Yes or No. Tally the number of No's to determine whether you need to upgrade your customer communications.

FACTORS OF A GREAT CUSTOMER EXPERIENCE:

#1 Communication Choices: Customers expect to connect on their preferred communication channels (phone, email, chat, social media) with minimal effort and have a consistent experience across them.

Does your business phone system...	Please Check	NO	YES
Manage incoming calls or other communications in queues?			
Allow customers to text your business?			
Support webchats, WhatsApp messages, or emails to manage all communications in one app?			
Give customers the option to be called back rather than wait on hold?			
	Total # of No's		

#2 Personalized: Customers want you to know who they are, why they're calling, and treat them accordingly while respecting their privacy.

Does your business phone system...	Please Check	NO	YES
Route customers to the right employee based on their location, account info, etc.?			
Prioritize which customers to respond to based on queue or customer info?			
Connect to systems of record to automatically screen pop customer information for inbound calls?			
Route calls or messages to the last employee they spoke to?			
	Total # of No's		

#3 Quick Access: Customers want inquiries resolved quickly and efficiently. That means minimizing wait times and empowering employees with the right tools and knowledge and giving customers alternative ways to interact.

Does your business phone system...	Please Check	NO	YES
Let customers input information (e.g., account ID, order number, etc.) to improve call routing?			
Enable customers to use self-service voice to resolve requests themselves whenever they want?			
Engage customers visiting your site using webchat?			
Give employees one application for all their internal collaboration (chats, video conferencing) and customer communications to quickly manage customer inquiries?			
	Total # of No's		

#4 Convenience: The best customer call is one the customer doesn't have to make. That means anticipating their needs and addressing potential issues before they arise.

Does your business phone system...	Please Check	NO	YES
Enable customers to use voice or chat self-service tools to resolve requests themselves whenever they want?			
Give your employee an AI-generated summary of the last interaction when a customer calls again to fast-track the conversation?			
Send automated two-way notifications via voice, SMS text, or email for reminders (e.g., appointments, bills) or other important information (e.g., business hours)?			
Automatically assign conversations for review that mention key phrases important to your business?			
	Total # of No's		

#5 Great Service Quality: Customers want businesses to continuously seek and act upon customer feedback to improve their offerings and interactions.

Does your business phone system...	Please Check	NO	YES
Offer call monitoring and performance tracking by queue, agent or calls using real-time dashboards and reporting?			
Let supervisors quickly review and score customer calls using AI to see sentiment, call summaries, topic/keyword tagging, and agent speech behavior?			
Automatically assign calls for review based on key phrases important to the business (e.g., "cancel order", "broken")?			
Archive customer communications for dispute resolutions, legal issues, and regulatory compliance?			
	Total # of No's		

Does Your Phone System Measure Up?

Add up the total number of No's in each section and use the table to see if your business phone system is holding you back:

0-5	6-14	15-20
You're doing great! Keep an eye on your key performance metrics to stay on top of changes to your customer experience.	You might need an upgrade. That all depends on whether you know your customers are happy with their experience. Are they? Do you have the tools to find out?	It's time to take a serious look at your customer communications. You may not be offering these experiences, but your competitors are.

READY TO ELEVATE YOUR CX?

Contact Center is a powerful tool for delivering exceptional customer experiences for businesses of all sizes. By utilizing the right capabilities, metrics, and taking a data-driven approach, you can gain valuable insights and continuously improve your CX strategy, ensuring your business thrives in the competitive landscape.

QUESTIONS? CONTACT US TODAY!