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UTAH • COLORADO

Go-to-Market Strategy

2023

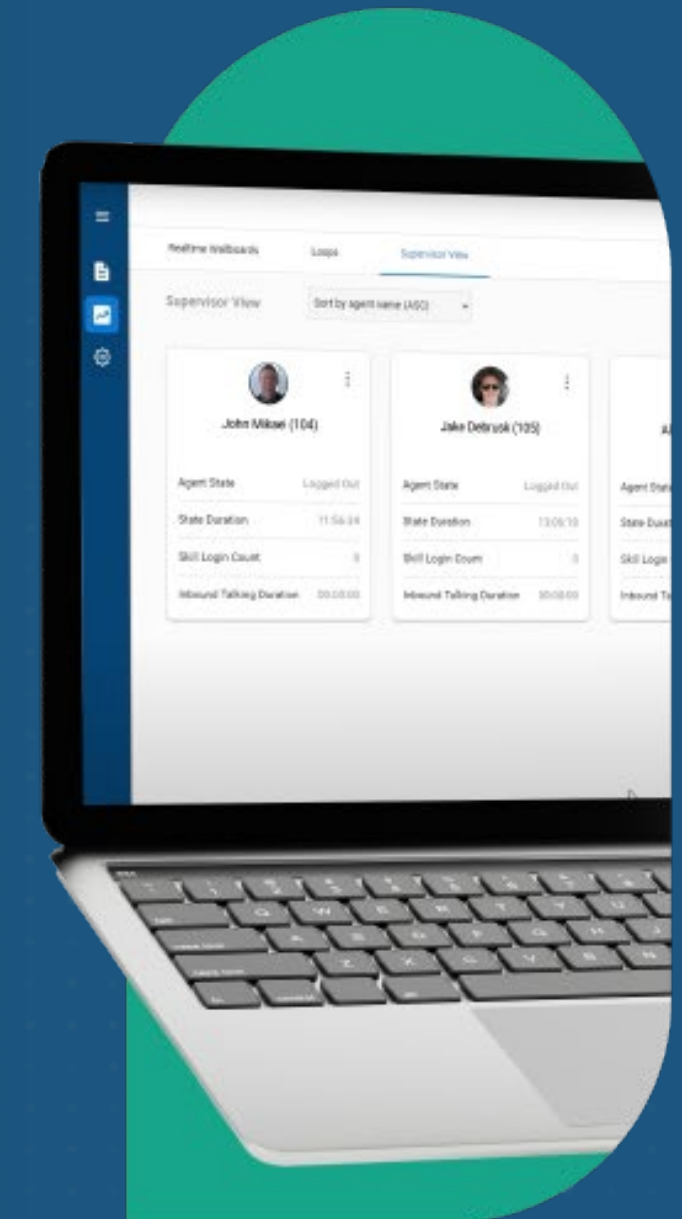




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Industry Overview

Retention Remains Top-of-Mind

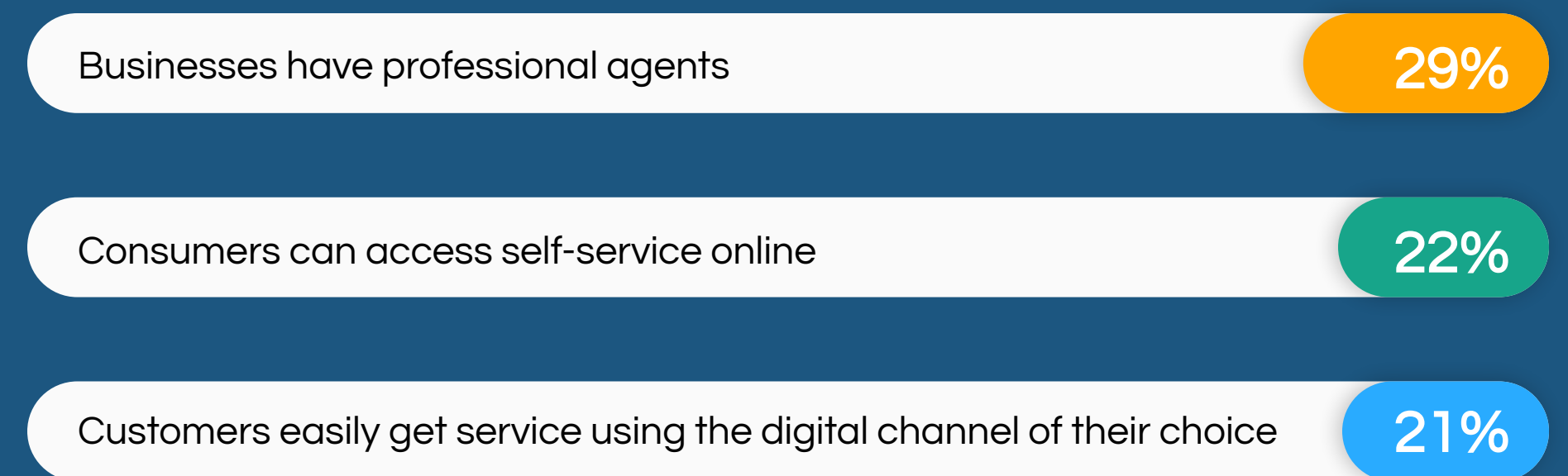


In the fiercely competitive business landscape, companies are increasingly recognizing the paramount importance of retaining customers as a central focus of their strategies. Retaining customers involves not only providing high-quality products or services but also fostering meaningful and lasting relationships.

By investing in customer retention efforts, companies aim to create a positive customer experience that goes beyond the initial transaction. This focus extends to personalized communication, customer support, and loyalty programs, all of which contribute to building a sense of trust and satisfaction among consumers.



The top three factors that contribute to higher customer retention and CLV ([customer lifetime value](#)), according to the [NICE study](#):



Agent Insight and More

Service teams need more time to work — but are expected to work faster than ever.

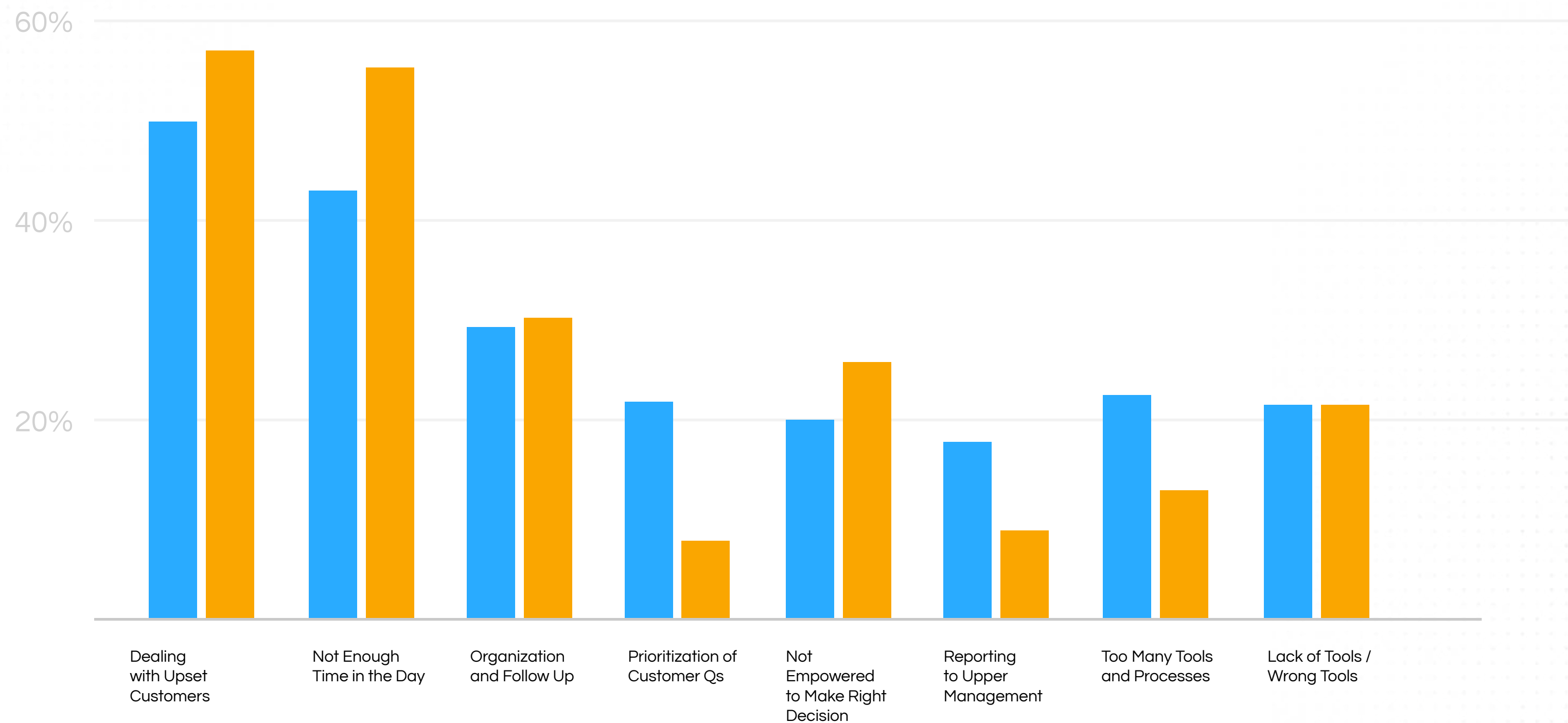
In 2022, a whopping 43% and 51% of agent-level respondents and high-growth and low-growth companies, respectively, said that not having enough time in the day was their biggest day-to-day challenge.

Luckily, service teams have begun to use emerging technologies like AI and automation to adapt to continuous time pressures. In HubSpot's 2023 State of AI Survey, **64% of service reps who use AI today said it enables more time to personalize and improve upon the responses they give to customers.**

In 2023, time remains a constant struggle. In a recent HubSpot survey of consumers, [60% said they would be more loyal to a brand with a fast customer service response time.](#)

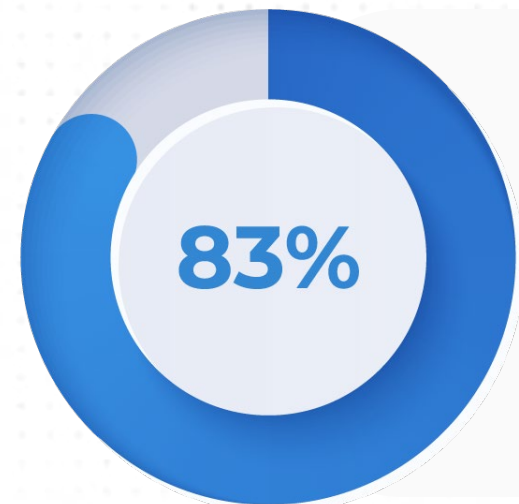
What are the biggest challenges as a service agent?

- High Growth
- Low Growth



Customer Increasing Expectations

In 2022, **88% of reps agreed that customers** have higher expectations than they did in previous years. Meanwhile, **79% said customers** are more informed than they were in the past. As the world becomes more fast-paced and hybrid, these expectations are growing.



Thus, **83% of consumers want to immediately connect** with a sales rep or support agent upon contacting the company.

In most cases, customers are calling service people when they've already reviewed all the troubleshooting steps, watched a handful of how-to videos, and surfed the online knowledge bases. What they really want is someone to relate to them, listen, and actively help them with an authentic level of care. With no waiting in line.

Shrinking service tech stacks will boost ROI.

Throughout the last three years, one thing became apparent:

Despite how connected we are to our computers, tablets, phones, and the world-wide-web, a lot of companies were buried in tech tools that didn't integrate, company silos, and data that didn't paint a whole picture of the business landscape. This, in turn, caused missteps that could potentially lose customers.

But, in 2023, service teams are beginning to catch on to the fact that streamlined and all-in-one software strategies can help reconnect them to other departments and their customers.

A 3D blue pyramid graphic with a white percentage '48%' on its top face.

48%

A recent HubSpot Report found of service professionals with a connected, 48% all-in-one solution beat their 2022 goals, while 44% of professionals who considered their tools "mostly integrated" similarly outperformed.

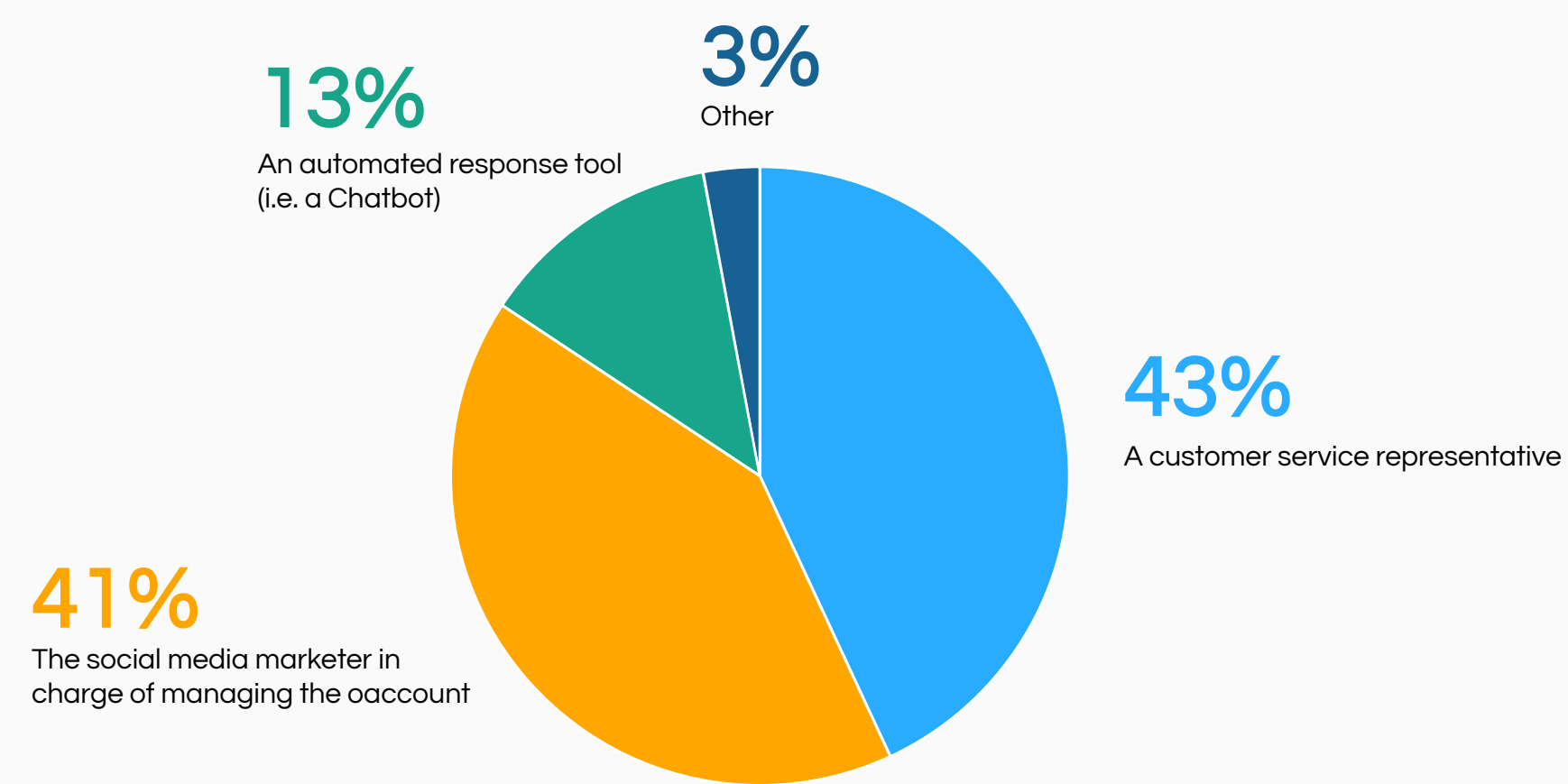
Social Media & Business Insight

Retention Remains Top-of-Mind

Think having a basic service phone number or email will be a leg up on the competition?

Unfortunately...

In a HubSpot survey of more than 120 consumers, **64% said they regularly use social media messaging**, such as Instagram Messenger, Facebook Messenger, WhatsApp, or Twitter DMs to get in contact with service teams.



Customer service is getting more social.

Hubspot's State of Social Media Report showed that **43% of companies offering customer service through DMs** have a customer service rep responding to messages, while 41% ask a marketer to handle messaging and escalate major service issues to them.

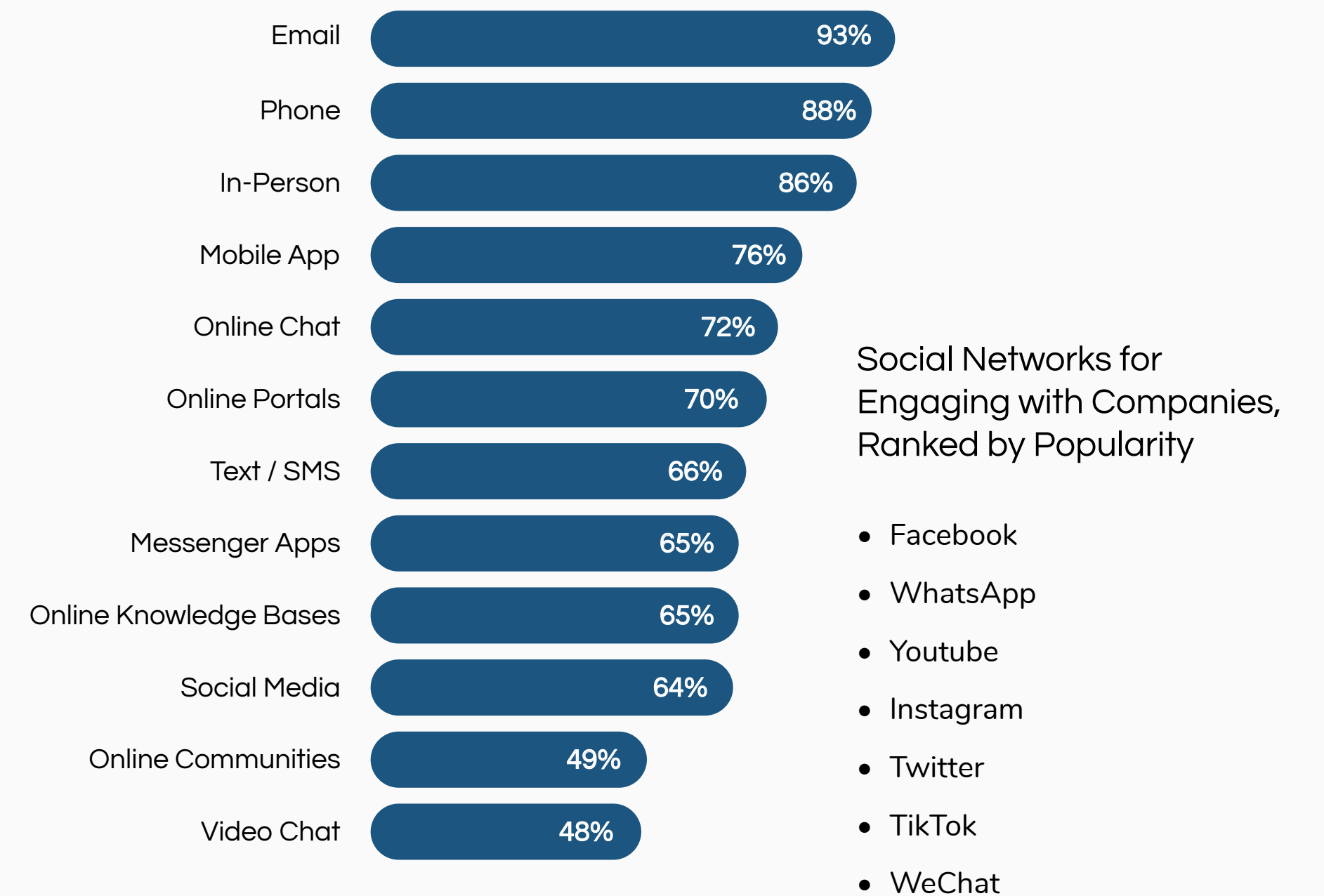
In the future, we expect to see more use of automated bots integrated into social media messaging platforms to streamline service or marketing's work there. In early 2023, 13% of the brands were already doing this.

CEOs from European B2B companies believe...

email support will still be dominant in the coming years until 2025, according to a new [SuperOffice study](#).

Customer Engagement Is Decidedly Omnichannel, Including Across Social

Channels Used to Engage with Companies



Xima's Value Proposition

Top Line Message

Customer Connections, Simplified.

Xima's cloud-based contact center solutions are tailored and easy-to-use to help get the most out of your customer touchpoints.

1.

Best-in-Class Reporting and Analytics

Uncover invaluable insights that help your support team operate more efficiently and effectively. Customizable analytics, reports, and dashboards give your support managers powerful, actionable ways to maximize your support efforts.

2.

Easy to Use and Quick to Learn

Xima's intuitive interface makes training easier and keeps users satisfied. User-friendly designs ensure that users can find the tools and information they need quickly and efficiently, improving call handling times and customer satisfaction.

3.

Fast Set-Up, Tailored to Your Needs

Install in seconds and configure Xima to your needs, without the hassle of changing vendors so you can be fully operational faster.

Xima's software easily plugs into your existing phone system or unified communications solution without requiring you to switch phones or numbers.

4.

Expert, Reliable Partners to your Customer Support Team

With a reliable reputation and vast domain experience, Xima has the reputation and experience your support team needs in a partner. Our experts are on-call to guide you along the way.

Pillar 1

Best-in-Class Reporting and Analytics

Proof Points

Xima has found meaningful differentiation of its reporting and analytics tools when stacked up to competitors across price points. Equipping “contact centers” with powerful analytics allows them to generate better insights and make business decisions that increase ROI and maximize the efficiency of operations.

- Reporting capabilities are often cited, by VARs with experience in the landscape and with Xima, as a differentiator.
- Generating meaningful insights from analytics was frequently cited as a challenge, allowing Xima to be set apart with advanced capabilities.
- Cradle-to-grave reporting eases the toughest task for CCaaS users – identifying challenges in individual calls. Xima’s functionality helps mitigate critical reporting challenges in contact centers.
- Xima’s basic license package stands out from competitors in the sub-\$50 price range due to its superior analytics and user/agent performance monitoring, while many rivals provide only limited reporting and analytics capabilities.

1.

Uncover invaluable insights that help your support team operate more efficiently and effectively. Customizable analytics, reports, and dashboards give your support managers powerful, actionable ways to maximize your support efforts.

Pillar 2

Easy to Use and Quick to Set Up

Proof Points

Xima is focused on the CCaaS market for SMBs who show a strong preference for tools that are easy to use and have intuitive user interfaces. Xima is able to deliver on this value proposition according to customer commentary from VOC interviews.

- Contact center agent and manager VOC interviews showed a strong preference for software that is easy to learn and use over software with advanced features that may lack intuitiveness or user-friendliness.
- Training was frequently cited as a pain point for those procuring CCaaS, as training staff on a system is a strain on both time and resources. Contact centers and customer service positions are notable for high turnover, which may necessitate constant trainings for new staff as old users leave. With a simple and intuitive UI, Xima can display benefits for not only the agent experience but also for ROI and operational efficiency with less waste on trainings.
- With a simpler interface and ease of use, companies are able to get their users up to speed and fully operational quicker.

2.

Xima's intuitive interface makes training easier and keeps users satisfied.

User-friendly designs ensure that users can find the tools and information they need quickly and efficiently, improving call handling times and customer satisfaction.

Pillar 3

Fast Set Up, Tailored to Your Needs

Proof Points

With a cloud-based deployment, Xima can be setup quickly and easily, although designing individual call flows and other tailoring processes may take additional time. Despite this, the value proposition remains strong to allow CCaaS users to get the software setup and operational quickly.

- Faster setup times often equate to cheaper setup costs with less employee involvement. During the purchasing process, many companies are evaluating total cost of ownership of CCaaS systems, which will include labor costs for setup.
- When switching CCaaS vendors, many companies are concerned about any interruptions in service while switching from one software to another. By having a fast setup process, that time will be minimized allowing for a quick and smooth transition to Xima.
- With Xima's WebRTC connection and ability to layer on top of an existing UCaaS or phone system, Xima can be plugged into an existing tech stack without requiring the customer to switch phones or numbers.
- Other competitors frequently advertise setup timelines that do not include the actual estimates beyond installing the software. With honest messaging that still focuses on speed, Xima is able to competitively position itself against competitors claiming to set up in seconds.

3.

Install in seconds and configure Xima to your needs, without the hassle of changing vendors so you can be fully operational faster.

Xima's software easily plugs into your existing phone system or unified communications solution without requiring you to switch phones or numbers.

Pillar 4

Expert, Reliable Partners to your Customer Support Team

Proof Points

CCaaS purchasers thoroughly vet multiple software vendors before making their final decision. While they are focused on benefits and features, these purchasers also place heavy emphasis on finding a software vendor who has dealt with use cases similar to theirs and who has a reliable track record.

- Due to Xima's heavy reliance on channel partners and Avaya, Xima has limited brand exposure with end customers. Googling the Xima brand to find reviews and testimonials leads to limited findings, which may deter some customers.
- VOC participants indicated a general hesitation to work with a vendor that was not public or notably well funded, with some even mentioning they would check a company Crunchbase before proceeding further with vendors. Xima must mitigate these concerns for direct sales. Xima has strong experience serving millions of users and thousands of companies, which provides ample proof points that Xima will be able to deliver the requisite service.
- Xima provides reliability and security from years of experience, which is paramount for certain large industries including healthcare and finance.
- Purchasers frequently peruse company websites to find use cases similar to their own, as a way of validating a vendor's ability to help. By prioritizing experience across industries and customers, Xima can win additional sales.
- Messaging around "partnership" demonstrates that Xima has a vested interest in the success of its customers treating them as partners and not just customers in the transactional sense.

4.

With a reliable reputation and vast domain experience, Xima has the reputation and experience your support team needs in a partner. Our experts are on-call to guide you along the way.

Xima's Success Stories



Accelerating Response Times and Delivering Better Patient Experiences

How Fairfax Pediatric Associates modernized their patient communication platform.

[Read the Full Case Study >](#)



Easier Management and Visibility Boosts Healthcare

Privia delivers tools, talent, and technology built to help doctors and their teams keep patients healthy. Privia decided to enhance its technology by using Xima Software solutions.

[Read the Full Case Study >](#)



Easy Interface and Great Reporting

When faced with an organizational restructure, Sansio Inc. was forced to expand, integrate, prioritize, and restructure its contact center. They needed a more viable, scalable solution.

[Read the Full Case Study >](#)



Accelerating Response Times and Delivering Better Patient Experiences

Compulink Healthcare Solutions Reduces Abandoned Calls and Improves Response Times
How Compulink Healthcare Solutions improved key performance metrics and efficiency at their contact center.

[Read the Full Case Study >](#)



Better Reporting Wins

Suburban Propane needed a reliable call reporting system, database redundancy, and a centralized management platform to keep up with its growth. That's where Xima stepped in to help. With our cutting-edge technology and expertise, we provided Suburban Propane with the tools they needed to streamline their operations and improve customer service.

[Read the Full Case Study >](#)

More Case Studies at
[Ximasoftware.com/
CustomerSuccessStories](https://Ximasoftware.com/CustomerSuccessStories)

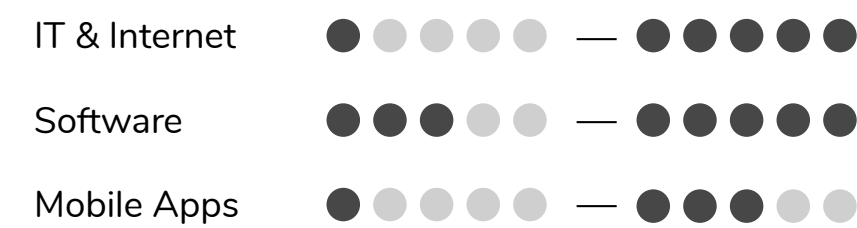
Operations & Procurement



Wants & Needs

- Wants to find the product that their agents love so as not to go through the evaluation process again.
- Needs an easy install with minimal touch points from their team.
- Needs it to be the right price. (Factors include: ROI, TCO)
- Wants the software to be well thought out with efficient workflows

Technologies



Demographic

Salary Worker, High Career Experience & Strategic Thinking, Has minimal support experience with the softwares they procure, Contacts Xima Tier 2 Support with Issues

Pain Points

- Switching costs can add up really quick.
- Training new employees on current tools can be difficult.
- Manages complaints about software and tools.
- They're accountable for providing good software that works.

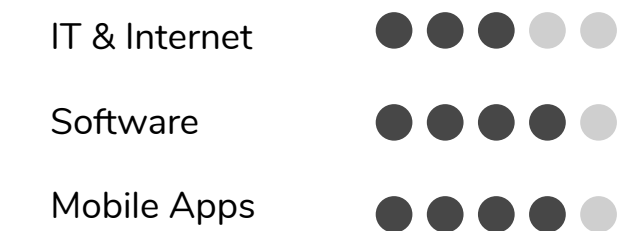
Supervisor



Wants & Needs

- Needs to be able to understand both sides during a dispute, the agents and customers.
- Wants tools to enable agent coaching and new employee onboarding.
- Needs productivity tools that give them insights so they can maximize their agents and optimize processes that work.

Technologies



Demographic

- Salary or Hourly Worker
- Medium to High Career Experience (3-5 Years in Contact Center)
- Is the point of contact for Xima Support Issues
- Knowledgebase for team on all systems they use

Pain Points

- Suffers from a high turnover rate as people move up or out.
- Minimal tools to see the historical and real time productivity of their team
- Difficulty getting agents up to speed with all the software in the contact center is a pain.
- Consistently short-staffed so needs to make the best of resources at hand.

Agent



Wants & Needs

- Needs frictionless and intuitive tools to boost the metrics they're rated on.
- Wants tools that allows them to show their efforts even when all else fails.
- Needs to handle multiple customer interactions at once. (Voice, Chat, Email, etc)

Technologies



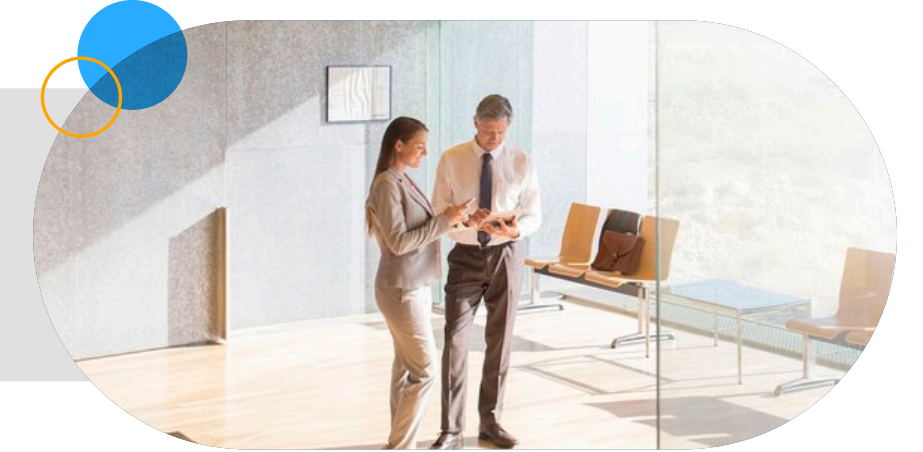
Demographic

- Rated on their daily metrics so any slowdown is a pain.
- Multi-channel software has a lot of screens and can be difficult to use daily.
- Constantly having to diffuse frustrated customers while hitting internal metric goals.

Pain Points

- Suffers from a high turnover rate as people move up or out.
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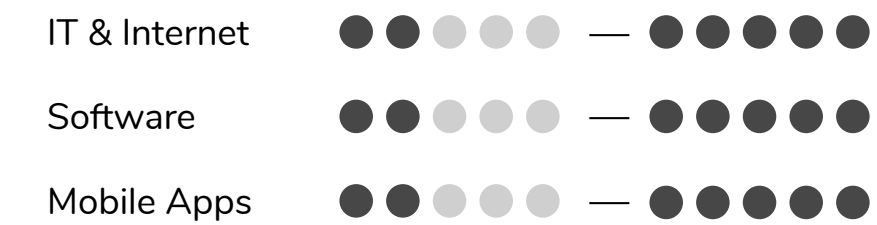
Executive



Wants & Needs

- Higher customer/patient satisfaction scores
- Improve business outcomes/bottom line
- Reduce turnover
- Reduce costs and administrative burden

Technologies



Demographic

- Rated on their daily metrics so any slowdown is a pain.
- Multi-channel software has a lot of screens and can be difficult to use daily.
- Constantly having to diffuse frustrated customers while hitting internal metric goals.

Pain Points

- Ability to generate additional revenue
- Low patient/customer satisfaction scores
- Data is not actionable
- High Turnover

Who are we targeting?

Salesforce Account List

Marketing Collateral Distribution

We'll use the marketing hub in notion to distribute materials.

Technology Stack We'll Use



Outreach Email Templates

EMAIL 1 – MQL - Executives

Subject Line: [First Name] Rethink Your Customer [or Patient] Experiences

Hi [First Name], In today's rapidly advancing world, healthcare organizations are rethinking their patient experience strategies. Xima is helping other companies like yours reduce operational costs, streamline patient experiences and most importantly provide actionable insights to improve patient care.

With that in mind, I'd like to connect with you to discuss how a cloud contact center solution could help [Company Name] streamline administrative tasks so you can focus on what matters – patient care. Do you have any availability this week for a short call? Signature

EMAIL 2 – MQL - Executives

Subject Line: [First Name] Labor Shortage with Healthcare Professionals

Hi [First Name], I wanted to reach out regarding a common concern amongst healthcare organizations like yours. According to Elsevier, 47% of American healthcare professionals are planning to exit the industry by 2025. This is causing the healthcare industry to expand its technology reach to reduce attrition rates, reduce absenteeism, and improve staff optimization and schedule adherence.

With that in mind, I'd like to connect with you to discuss how Xima could help [Company Name] streamline administrative tasks so you can focus on what matters – patient care. Do you have any availability this week for a short call? Signature

Discovery Questions

Best Opening Questions

- How important is customer service to your organization? How do you measure it?
- How do you actually make money?

Customer Experience Questions

- Do you have abandoned calls? How many abandon calls do you have each day?
- How much is an abandoned call (prospective customer) worth to your organization?
- Are you looking to reduce abandoned calls?
- Tell me how you route calls? What are the decision-making criteria and process?
- Are some of your employees better at handling calls, assisting customers, than others?
- Do you have priority customers? If yes, how do you provide them preferential treatment?
- Do you communicate with customers outside of the phones? Example: email, web chat, SMS, social media (WhatsApp, FB Messenger, etc)? If no, would you like to?
- Do you have appointment reminders? Do you call customers or send SMS messages to remind them?
 - » Can customers confirm/cancel/reschedule their appointments via SMS?
- Do you need visibility into your call volume, queues, who's answering/missing calls? Both historical or realtime?
- Do you record calls for training/coaching purposes? Legal purposes? If yes, what do you do with those recorded conversations?
- For remote workers, new employees, etc do you need to capture what they are doing on their PC screens (to provide coaching and performance feedback/improvement)?
- How do you schedule your team members for their shifts? How do you forecast how many resources (employees) that you will need each day and especially during your busiest days/times?
 - » How do you ensure adherence to your schedules?

Do Not Use These Terms

Call Center
Contact Center
CCaaS
Cloud Contact Center

Additional Resources

Top Industries

- [Healthcare](#)
- [Financial](#)
- [Manufacturing](#)
- [Software and Technology](#)

Personas

- [Xima for Supervisors](#)
- [Xima for Agents](#)
- [Xima for Management](#)
- [Xima for Operations](#)

Thought Leadership Articles

- [Maximizing ROI by Moving to the Cloud](#)
- [The TLDR on Migrating to the Cloud](#)
- [Call Queuing Software for Maximum Agent Efficiency](#)
- [How Skills-Based Routing Can Improve Customer And Agent Experience](#)
- [Using Queue Callback to Reduce Abandoned Call](#)

Industry Reports

- [Forbes: 100 Customer Experience Stats](#)
- [Salesforce: State of the Connected Customer](#)
- [Nice: Digital-first Customer Experience Report](#)
- [Vonage: The Future of Contact Centers: Trends and Predictions](#)
- [Hubspot: State of U.S. Consumer Trends Report](#)
- [Qualtrics: Contact Center Trends](#)

