Happy customers, efficient businesses: How to supercharge growth with virtual receptionists
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## INTRODUCTION

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Happiness.

Peace of mind.

A tool that just works.

A service that gets it right the first time.

A friendly voice.

A listening ear.

We all want the same things. As customers, as business owners, as people, we all want joy, freedom, respect, knowledge, and fair treatment. And when we pay for products or services, we expect convenience, assistance, and value for our money.

But not every business delivers. Customers don’t get what they want. Clients wait too long for answers. Calls don’t go through. Website visitors bounce. People walk away dissatisfied and disappointed.

These things happen every day, and it costs companies in the United States upwards of $62 billion a year.¹ (That’s a conservative estimate, by the way.) Factor in buying power and unsatisfied consumers taking their money elsewhere, and the cost of negative customer experiences climbs to more than half a trillion dollars.²

Let’s put an end to bad customer experiences. By exceeding your customers’ expectations in every interaction, you’ll supercharge your revenue, win loyalty, and become a leader in your market. (Oh yeah, and you’ll make the world a happier place, too.)

¹ HelpScout
² Business2Community
CHAPTER ONE

What is customer experience and why does it matter?

Customer experience is everything your customers feel when they interact with your business. It encompasses every part of your brand, every channel through which your company communicates, and every stage of a customer’s or client’s journey.

We’re talking about somebody’s experience...

- Using your products or services
- Reaching out to you over the phone
- Talking to you or members of your team
- Browsing your website
- Visiting your physical location
- Reading your marketing emails
- Watching your videos
- Connecting with you on social media
- ...and more
### WHAT DOES A GOOD CUSTOMER EXPERIENCE LOOK LIKE?

| ✔️ All channels work seamlessly together. | ✔️ People find value in your offerings. | ✔️ Products are easy to use. |
| ✔️ Services fulfill needs. | ✔️ Marketing resonates deeply with prospects. | ✔️ People have the right expectations. |
| ✔️ Customer service is prompt and friendly. | ✔️ Questions are answered instantly—or even before they’re asked. | ✔️ People get the help they need, when and where they need it. |

Lackluster customer experience, on the other hand, can take many different forms:

- Poor-quality products and services
- Misaligned expectations
- Overcharging
- Underdelivering
- Confusing terms of service
- Unanswered phones
- Unprofessional customer service
- Extended wait times
- Disorganization
- Miscommunication
- Slow-loading or badly designed websites
- Systems that don’t “talk” to each other
THE (NOT-SO) HIDDEN COSTS OF LACKLUSTER CUSTOMER EXPERIENCE

As you might expect, customer experience problems frustrate existing and potential clients, frequently driving them away. Optimizing your customer experience is a matter of staying in business and remaining competitive.

In today’s hybrid world, with virtual and in-person realities blending further by the day, businesses must optimize the totality of their customer experiences. Merely having an online presence is no longer enough. The pressure is on every business to become a 24/7, local-plus-virtual, omnichannel operation.

Online and off, customer and client expectations have reached an all-time high:

- The average customer has six touchpoints with a business when purchasing a product or service.³
- 90% of customers want businesses to provide omnichannel service.⁴
- 91% of people who are unhappy with a company’s customer service will stop doing business without ever raising a complaint.⁵

OMNI-WHAT?

Not every customer or client interacts with your business in the same way. Some may prefer learning about you through your website, while others may want to call or text you. Increasingly, people use multiple channels when considering a purchase—they hop from one medium to another.

In an omnichannel customer experience, all platforms customers use to interact with your business (e.g., website, social media, phone, and in-person interactions) are aligned and synchronized. As a result, your customers can switch from channel to channel without having to start from zero or dig for what they need.

In other words, your customers or clients expect rapid, on-demand, and personalized service however they choose to interact with your business.

But providing that experience carries its own costs. Few businesses are equipped to go omnichannel on their own. Instead, their best option for meeting their customers’ and clients’ demands is to bridge the gap with various third-party solutions.

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³ Business2Community
⁴ Ibid
⁵ Huffington Post
LET’S GET CUSTOMER EXPERIENCE RIGHT.

How do you make sure all your systems work together to achieve maximum efficiency, cost savings, return on investment, and—most importantly—customer satisfaction?

At Ruby, we’ve helped numerous businesses find the answers to these questions. As the voice of more than 13,000 businesses across industries and regions throughout the US, we create extraordinary customer experiences online and over the phone. Our team of virtual receptionists and chat specialists answer more than one million calls and 60,000+ chats a month. We know from experience that every business’s message, brand, and connection to customers is unique but also that there are shared challenges when it comes to ensuring the best experiences for the people they serve.

Over the following pages, you’ll learn everything we know about integrating your tools for maximum efficiency, seamless omnichannel experiences, and true customer happiness. You’ll also learn how Ruby saves hours in your day while building meaningful connections and lasting loyalty for your business.
You’re sitting at your desk. It’s the end of the month, and you’re digging into your budget spreadsheet, updating line-item costs while being careful to avoid altering the formulas. You’re focused on making the numbers work—only to be snapped out of your flow by a ringing phone.

It’s an irritating interruption, but you pick up the phone and do your best to sound polite while handling a current customer’s question. Several minutes later, you look back at your spreadsheet, struggling to remember where you left off. And just as you find your spot, the phone rings again, and your patience starts to wear.
It takes an average of 23 minutes and 15 seconds to regain focus after every disruption. And those interruptions come at a high cost when you’re a small team or a team of one.

FOR EXAMPLE, FIVE PHONE CALLS IN A WORKDAY COULD MEAN A REVENUE LOSS OF:

<table>
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<th>Service</th>
<th>Revenue Loss</th>
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<tbody>
<tr>
<td>Lawyer</td>
<td>$475</td>
</tr>
<tr>
<td>Financial Planner</td>
<td>$575</td>
</tr>
<tr>
<td>Plumber</td>
<td>$536</td>
</tr>
<tr>
<td>Orthodontist</td>
<td>$270</td>
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Compound the above by the same number of missed calls each day, and you’re looking at between $1,350 and $2,680 in lost revenue a week, or $70,000 to $140,000 a year.

That’s not all. There’s a cost beyond productivity loss and billable hours—the potential damage to your customer experience.

A customer doesn’t know they’re the fifth interruption in the last hour. They don’t know other people have asked you the same question multiple times that day. They expect your full attention and a great experience, with time to discuss all their concerns. Losing your patience, rushing through a call, or not answering a call at all could prompt the customer to move on to a competitor—or worse, share a negative review of your business.

So, how do you decrease interruptions while still delivering a fantastic experience?

No small team or individual business owner can do it alone. They have help.
TAKING THE FIRST STEP

You may be reluctant to seek outside help when it comes to your business. After all, you’ve worked hard to build your brand and reputation. Handing that over to someone who hasn’t metaphorically shed blood, sweat, and tears with you can feel like a Grand Canyon-sized leap of faith.

Think of it this way: it’s the same leap of faith the people you serve take. When customers or clients hire you, it’s because they recognize that special competence you have—and because they don’t have it themselves. They don’t have the tools or abilities to successfully defend themselves in court, negotiate a contract, fix their HVAC unit, or make the right long-term investment decisions.

Now, turn that mindset around and think of yourself as the customer or client. What are you not an expert in and where do you need help?

HOW A VIRTUAL RECEPTIONIST SOLUTION WORKS WITH YOUR BUSINESS

Answering the phone only solves one part of the challenge. Remember, the goal is to reduce interruptions while also growing your positive reviews and building customer loyalty. A quality virtual receptionist solution, such as Ruby, is focused on three primary goals:

- Ensuring callers receive a consistent experience
- Routing calls based on the needs of your business
- Taking detailed notes so you’re kept in the loop on all communications

Expert call handling is at the core of each of these goals.
WHAT DOES CALL HANDLING MEAN?

Call handling is the A-to-Z, start-to-finish process of managing phone calls. It’s every step your organization takes when a call comes in or when placing an outgoing call.

We’re talking about...

- Whether or not a call gets answered
- How it gets answered
- The way a company representative communicates to the person on the other end
- How the company deals with call traffic
- How calls are routed
- Which calls are blocked
- How issues get resolved
- What happens when callers are transferred or put on hold
- What information gets logged during and after a call

Good call handling can be the difference between a positive and decidedly negative customer experience. Unfortunately, due to the reasons above, many teams lack the internal resources to ensure high-quality call handling every time. As a result, customer-centric businesses bring in the call handling experts, AKA virtual receptionists.
HOW DOES IT WORK?

Call handling takes numerous forms, and it varies across businesses based on factors such as an organization’s size, location, customer base, operating hours, technological capabilities, and sales and support strategies.

Here’s what to consider for you business’s call handling needs:

To begin, you first determine how you’d like to forward your calls. Call forwarding allows virtual receptionists to sound like they’re answering from your office, even from thousands of miles away. You save money, and your callers receive exceptional care, never knowing they’re chatting with a remote receptionist.

The second consideration is when or how often you’d like the virtual receptionist to answer your calls: full-time, part-time, or as backup.

To determine which is right for your business, consider which of the below best describes you:

- I prefer to respond to client calls on my own time. ➔ Full-time answering
- I have set office hours which blocks of times I’m available for calls. ➔ Part-time answering
- I enjoy taking client calls, but I worry about the calls I miss when I’m on the other line or focused on work. ➔ Backup answering
- I’m okay taking calls during the day but only want to be available after-hours if something is an emergency. ➔ Part-time answering
- I prefer having some time to prep for a client before I answer a call. ➔ Full-time answering
Let’s dig into what each of the forwarding options means.

**FULL-TIME FORWARDING**

With this option, virtual receptionists answer all your calls live 24/7 or during the hours you set. In addition, you can choose to have calls connected directly to you once they’ve been answered, or have the caller announced so you can decide whether you’d like the call connected (an action called a “warm transfer”), have the receptionist take a message, or send the caller to voicemail. No matter which option you choose, a quality virtual receptionist should act as the frontline of your business and ensure callers receive a consistent, personalized experience every time they call.

**PART-TIME FORWARDING**

Have fixed office hours? Prefer to take your own calls when you’re available? Part-time forwarding means a virtual receptionist answers for you only some of the time, either during prearranged times of the day or as needed—for instance, when you’re working in an uninterrupted block of “focus time.” You can also create a forwarding schedule to route calls to different numbers throughout the day. This is particularly useful if you work from an office some days and at home other days, have team members on various shifts, or prefer to have after-hours calls directed to your voicemail system.

**DELAYED CALL FORWARDING**

The right solution will give you complete control over when and how calls are handled—and who handles them. For example, suppose you enjoy interacting with customers and find you can work around the interruptions. In that case, this option enables you to take calls while not missing a beat if you happen to be on the other line or out and about.
YOUR NEW BEST FRIEND: CALL SCREENING

As a business owner, you can’t afford to miss a call from a prospect or existing customer—but the reality is that not every call falls into one of those categories. Nearly 5% of calls to businesses are spam or robocalls, costing Americans billions of dollars every year.¹¹ And even when a call is from a real person, that individual may only be looking to gather information or isn’t a fit for the services you offer.

In addition to keeping you focused, a virtual receptionist helps sort out relevant calls while also gathering the information you need to know how and when to follow up with a current or potential customer.

For example, Ruby’s robocall filtering feature automatically sends likely robocalls straight to voicemail and tags them as such. When you visit your Ruby dashboard, the visual cue helps you quickly identify robocalls from customer calls, making it easy to determine which communications to prioritize. You can confirm the call’s content by listening to the recording or reading the voicemail transcription.

Call screening has benefits beyond eliminating the headache of robocalls—it also creates a better customer experience. As we mentioned earlier, some callers may be looking for a service you don’t offer. Perhaps your legal practice doesn’t cover a specific area of the law, for example, or your office isn’t taking on new patients at the moment.

A virtual receptionist can proactively address these concerns during the initial call, saving you time while passing along that you received an inquiry nonetheless. (If you’re interested in learning more about how screening can assist in capturing new opportunities, check out chapter 4 on mastering your funnel.)

¹¹ Business2Community
A SOLUTION AS FLEXIBLE AS YOU ARE

While many businesses face similar customer communication challenges, efficiency can look different depending on the business. For example, a home services company with multiple employees out on job sites will have different call handling needs than a financial planner who works from home and occasionally needs to meet in-person with clients.

Whatever your customer communication needs look like, and however frequently the change, the right virtual receptionist solution makes it easy to stay flexible. Your decision to take or not take calls at a given time is what Ruby calls your “status.” Updating your status throughout the day enables your team to work from anywhere while keeping us informed on how you want your calls handled.
Here are a few examples of how status can increase efficiency and provide an excellent experience for both a business and its callers:

**ROOFING COMPANY:**
Employees can switch their status to “not taking calls” while on a project and instruct the receptionist to take messages. During a break, the employee can review the messages through Ruby’s mobile app. Once the job is complete and they’re back in their vehicle, the employee can update their status to “taking calls” and resume answering.

**CRIMINAL ATTORNEY:**
Constantly in and out of court, a criminal attorney may have their default status set to “not taking calls,” with receptionists always offering to take a message or send callers to voicemail. The attorney, however, wants to ensure a judge can always get through. Their status can remain as “not taking calls,” but they can add an exception that specific names and numbers are sent through their mobile phone.

**MARKETING CONSULTANT:**
Many of the consultant’s clients are high-touch, and referral business is crucial to the business’s growth. Clients must therefore know when to expect calls will be returned. To provide transparency, the consultant can instruct the receptionist to tell callers, “I’m in a meeting,” “traveling,” or even “out sick” when not taking calls. Additionally, they can have their status return to the default of taking calls after a set time, such as after an hour or the next day.

With Ruby’s status feature, you have the freedom to choose when and where you receive calls, as well as what experience your callers receive if you’re unavailable.
WHAT WOULD RUBY LOOK LIKE FOR YOUR BUSINESS?

A virtual receptionist solution should act as an extension of your team, seamlessly integrating into your customer journey and workflow just like a full-time hire (though at a fraction of the cost). Everything from how you forward your calls, your handling preferences, and your status updates and instructions should be designed for your specific business needs.

Solopreneur

For business owners just starting out or those who prefer working on their own, there are several ways a virtual receptionist solution such as Ruby can increase efficiency.

CHOOSE HOW TO SPEND YOUR WORKDAY.

As opposed to your calls dictating how you work, a virtual receptionist helps you work calls into your day. You can send callers to voicemail or have us take a message while you answer emails. We can announce callers before connecting, so you can take a few minutes to prepare and have a productive conversation or decline the call to follow-up when it’s more convenient.

AVOID BURNOUT.

When you are the only one handling customer service, it can be tempting to answer calls at all hours of the day. Unfortunately, that means little time to work, let alone seeing your family and friends, so your business eventually starts to suffer. A virtual receptionist solution can answer calls 24/7, giving your business the appearance of always being available while giving you back much-needed time.

GROW YOUR BUSINESS WITHOUT THE PAIN OF HIRING.

Hiring and training an employee takes time and resources. As a solopreneur, you can’t stop what you’re doing to build an onboarding program or monitor performance. A virtual receptionist solution allows you to scale your business with minimal investment. Plus, Ruby pays attention to caller sentiment and the number of minutes you’re using. Doing so enables us to suggest changes—such a reducing the number of screening questions or having Ruby answer common queries—improving your and your customers’ experiences.
Small business

You’ve managed to grow your business to the size where it can support a few employees, and, like you, each employee wears multiple hats. You may have an office, but your employees often work from home, or the nature of the work keeps them on the road. In this situation, staying efficient means reaching employees no matter where they’re located while also keeping everyone in the loop on their respective calls.

EASILY MANAGE A VIRTUAL OFFICE.

One benefit of an office is having every team member in one location built to eliminate interruptions. When you’re working from home or out traveling, it can be challenging to achieve the same efficiency level or stay connected with your team. A virtual receptionist solution combined with mobile technology not only minimizes distractions but also keeps your team in the loop. Each employee can update their call handling status directly from their smartphone, which avoids one person having to keep track of who is and is not taking calls.

MINIMIZE STAFF OVERHEAD.

It takes significant time, money, and effort to hire and train one or more in-house receptionists. And given the high turnover rate among customer-facing employees12; keeping the position filled can be a stressful and expensive cycle. A high-quality virtual receptionist solution ensures you always have a friendly, capable team ready to handle communications with your customers or clients.

ELIMINATE EXPENSIVE INFRASTRUCTURE COSTS.

These days, most employees use mobile phones for work as it keeps infrastructure costs low and allows for more mobility. However, it can also mean you or your team isn’t always in the best location to take a call. A virtual receptionist provides a professional voice no matter where you are and then enables you and your team to decide if they can take the call.

Plus, the same app that allows you to update your call handling on the fly also ensures your employees can keep their mobile phone numbers private. There’s no need to invest in office phones or company-owned mobile devices to protect employees’ information—not to mention fewer phone bills!

12 Indeed.com
Mid-sized business with a receptionist

You’ve taken the leap and hired a full-time receptionist for your business. In addition to handling calls, your receptionist welcomes visitors to your office, coordinates supply orders, takes care of mail and shipping, and handles several more administrative tasks. The additional work benefits other areas of your business, but it pulls focus away from customer experience; the receptionist has multiple tasks other than ensuring every call receives the utmost attention. In this kind of situation, a virtual receptionist solution can act as a support system for your receptionist and ensure there’s someone on your team whose job is 100% dedicated to customer experience.

NEVER MISS A CALL.

Even a full-time receptionist can only answer one call at a time—and everyone needs the occasional break. Virtual receptionists can act as a backup option, capturing calls after a certain number of rings, so no calls are missed. And, with 24/7 service, even after-hours calls can be answered live and directed to the appropriate individual in the event of an emergency.

And what about when your receptionist takes a vacation or is out sick, or you’re between hires? You may pull another employee off their work to handle incoming calls, but then you’re only compounding the problem. A virtual receptionist makes sure your phone is always manned by a highly-trained professional at the ready—no additional training required. No matter what’s happening with your internal team, your callers receive consistent experiences, and your business never misses a beat.
Rebecca Flanagan gets a lot of calls. As a sought-after estate administration attorney, she needs to balance multiple (often emotionally intense) conversations at any given time.

And it’s not just current and potential clients reaching out. As she writes on her website, Rebecca is dedicated to “making a positive difference in her corner of the world” and acting as a resource for her community. That means she doesn’t turn away callers looking for assistance beyond her practice area.

“I am the only lawyer that many of my clients—and even my friends—know,” Rebecca says. “So, if you do need a divorce lawyer or a family lawyer or even an estate planner, come to me, and I will help you find somebody.”

Unfortunately, every call eats up valuable time—time that a solo practitioner such as Rebecca can’t afford to lose. According to Clio’s Billable Hours Index, a typical small law firm “only collects 1.5 hours of paid work time for each workday.” Plus, as we explored in the last chapter, it takes an average of 23 minutes and 15 seconds to regain focus after an interruption.

From a purely economic standpoint, a day in which Rebecca receives four calls or more from non-clients is unproductive. But the day she refuses to help people in need is the day she stops following her values.
THE CHALLENGES OF MAKING TIME FOR CUSTOMER EXPERIENCE

Rebecca is far from the only business owner who has faced this kind of challenge. Millions of entrepreneurs and professionals are caught in similar predicaments, tugged in all directions by disparate obligations to their customers, communities, and bottom lines.

In addition to balancing customer service with running their companies, many business owners also find themselves in the frustrating position of answering the same questions dozens of times per day:

- Where are you located?
- What are your prices?
- When’s your next available appointment?
- When can I expect a follow-up?
- Do you offer same-day service?
- Do you charge for legal advice?
- How long should I hold onto my tax documents?
- What’s wrong with my water heater?
- Am I at risk of a cyberattack?
- Is acupuncture painful?

Increasingly, the people asking these questions expect live, personal responses at all hours, on whichever channels they use to reach out. They want fast, friendly, compassionate service online, over the phone, and on other communication channels—all of which strains already-overburdened businesses and their owners. It’s no wonder that many business owners work more than 50 or 60 hours a week and that nearly 50% avoid taking vacations.15

15 Score.org

Hear more from Rebecca how integrating a virtual receptionist into her practice has helped her find work/life balance while improving client satisfaction.
AT A GLANCE: THE ROI OF CUSTOMER EXPERIENCE

As time-consuming and challenging as communication with customers can be, businesses must optimize things here. Positive customer experiences build trust and relationships, ensuring people get the information they need to make purchasing decisions. The faster that organizations can supply that information, the greater their chances of earning and retaining business.

And every exchange adds up. Every moment of extraordinary service builds an organization’s reputation, driving valuable word-of-mouth referrals along with lasting loyalty. It’s the most powerful, scalable, and cost-effective way to grow a business.

- Consider that 92% of consumers trust their friends’ and families’ suggestions more than advertising.\(^\text{16}\)
- Or that as little as a 5% increase in customer retention can boost profitability by 75%. \(^\text{17}\)
- Or, how about the fact that loyal customers generate 10x more than the value of their first purchase over time? \(^\text{18}\)

How to elevate your customers’ experiences without overburdening your business

How do you make time for customers or clients when you have no time to spare? How do you ensure the people you serve experience the extraordinary, just-in-time communication they expect and deserve?

How can one business—or one human—deliver superhuman customer service?

Once again, it’s not a job any one person can do alone. To get there, you’ll need the right tools and team. The best customer engagement solution will provide both as well as insights you can use to track your performance—all bundled with individualized, proactive guidance whenever you need it.

\(^\text{16}\) BigCommerce.com
\(^\text{17}\) Ibid.
\(^\text{18}\) Salesforce
HOW DOES A VIRTUAL RECEPTIONIST SOLUTION ELEVATE YOUR CUSTOMER EXPERIENCE AND UNBURDEN YOU?

1 PROVIDING SEAMLESS EXPERIENCES FOR CALLERS:
There’s no reason outsourced customer communication needs to sound outsourced. The best customer experience solutions take steps to embed themselves in any organization they represent by using the same terminology and tone an in-house customer-facing employee would. They become familiar with the business and its customers to sound familiar to those individuals.

For example, at Ruby, we do this by...

- Creating and maintaining a list of your frequent contacts, with details and notes about each contact.

- Using a “whisper” tool that speaks your organization’s name to the person answering the phone, ensuring they pronounce it correctly every time.

  Stiller and Stiller Law Firm. How may I help you?

- Using local details such as time and weather to create connections with callers and sound like we’re onsite.

  73°F  10:54 AM (Pacific)
ENSURING AFTER-HOURS COVERAGE:
Customers may expect your business to run 24/7, but that doesn’t mean you have to run it personally that whole time. A customer experience solution like Ruby will have you covered when you’re away from your desk or device, so you can work and relax uninterrupted.

Best of all, you have options. Suppose you receive urgent calls before or after your office hours. In that case, a virtual receptionist can answer those calls live, direct some or all calls to voicemail, or forward calls to a contact or a number of your choice—among other options.

CREATING BETTER FAQS:
Answering the same question dozens of times a day is neither a good use of your time nor mental and emotional energy. When it comes to improving your customer experience while saving time, developing a set of answers to common questions is the lowest hanging fruit—and something a customer engagement solution like Ruby can easily take on!

Not only that, but a premium solution will help you create, modify, and enhance your FAQs. A typical Ruby receptionist takes hundreds of calls per day, and each of our chat specialists handles a comparable number of online conversations. We can tell you what information your customers are looking for, so you can make that information more readily accessible to callers or website visitors. Many of our customers have used Ruby to do precisely that, saving time while setting the right expectations upfront.
CUSTOMER EXPERIENCE SOLUTION + YOUR INTERNAL TEAM & TOOLS = 100% WOWED CUSTOMERS

You can never have too much of a good thing—and that’s particularly true of people passionate about customer experience. Having an internal customer support team means you have employees dedicated to resolving issues from start to finish, but even those folks can use a hand from time to time. Just as a solution like Ruby can help you stay focused, we can also keep your customer support team centered on the things only they can solve versus answering all incoming calls and chats.

A customer engagement solution can act as a backup or as the first line of “defense” against incoming communications, making sure calls are routed to the right people. For instance:

- We can insulate your internal customer support team members from non-urgent or off-topic calls or chats or serve as a buffer when lines are busy.
- We can answer FAQs or direct customers to an email address or webpage, saving internal employees time and frustration.
- We can schedule appointments using your preferred online calendar, helping internal employees avoid back-and-forth scheduling conversations.
“We use Ruby to answer our phones when our staff can’t get to an incoming call, and on Fridays from noon on so we can get some work done. Great folks, excellent service, and very professional phone etiquette. When we first started using Ruby, one of our paralegals called in from home and initially thought we’d hired someone new in the office.”

- Merianne Dean, The Dean Law Group, APLC
For much of the last two centuries, your location was the most important factor in your growth. Consequently, many marketing and communication efforts drove traffic to a physical location. However, as populations grew and cities expanded into suburbs, advertising methods such as radio, TV, billboards, phone books (remember those?), and direct mailers became essential to extending your reach.

Then the internet happened. The same traffic-driving principles still apply in the 21st century, but the marketing mix looks different, and the definition of “location” has shifted. It’s no longer just about the proximity of your physical location, but the location of your website—how easy you are to find online. Meanwhile, digital marketing and advertising now supersede more traditional methods for attracting that online traffic.

SAY IT WITH US:
Location, location, location.

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Despite these new technologies, the problem for businesses remains age-old: Once you’ve increased the efficiency of your business and improved your customer experience (as per our last two chapters), how do you capture more opportunities and make sure all this work is paying off?

**FIRST, LET’S IDENTIFY WHICH PROBLEM PRESENTS THE BIGGEST CHALLENGE FOR YOUR BUSINESS RIGHT NOW.**

| I’ve invested in a website and driving traffic to it, but nothing is happening. |
| My digital marketing investment is working, but I can’t handle the additional traffic and am missing opportunities. |

**EXAMPLE:**
Acme Roofing spent time and money building a beautiful website for their new business. The company had hoped that explaining their services and showing testimonials from happy customers would drive new leads. But while they’ve seen a slight increase in phone calls, they aren’t closing more sales opportunities.

**EXAMPLE:**
Ye Olde Retirement Home hired an outside firm to manage their marketing—digital ads, SEO, direct mailers, you name it. The campaign has been a success, and website traffic and phone calls are up! But the frontline team can’t handle all the incoming leads and manage the regular day-to-day calls, so potential new residents are ignored.

In both cases, the business is investing in growth but failing to capitalize on opportunities—while also creating poor experiences for potential customers.
THE THREE KEYS TO IMPROVING YOUR ROI & CAPTURING MORE BUSINESS

You make tough decisions every day, and money invested in one area of the business often comes at the expense of another. Therefore, it’s critical you...

- Capture every opportunity with the proper infrastructure.
- Collect the information necessary to follow up with and convert leads.
- Create a great experience that will result in conversions and repeat business and referrals. Now, consider how many leads you convert into customers and the value of a new customer or client.

1 Capture every opportunity with the proper infrastructure.

As we mentioned at the beginning of this guide, not every customer or client interacts with your business in the same way. You can drive all the traffic possible to your business, but if you aren’t empowering those customers to reach out in the way they want, they’ll move along.

60% of smartphone users have contacted a business directly using an option in the search results, such as the “click to call” option. 19

46% of customers are more likely to buy from a company with live chat support. 20

19 HubSpot
20 Glance
Let's talk first about the phone. If you don’t have your business number prominently listed on your website or included in your Google My Business profile, **stop reading and fix that right now.** Mobile searches for “near me” have increased by more than 200% over the last several years, which means you’re missing out on customers looking for your business primed to call.\(^{21}\)

Of course, having the phone number available is only the first step. Next is making sure someone’s there to answer callers. Keep in mind that 67% of callers will hang up when they fail to reach a live person.\(^{22}\) Implementing a 24/7 virtual receptionist solution ensures your business line is always answered by a trained professional ready to address your current and potential customers’ needs.

But what about the customers who don’t want to pick up the phone? While many business owners feel and understand the anxiety of a ringing telephone, many disregard the potential customers visiting their websites. Yet, these visitors are often just as likely—or more likely—to convert into paying customers.

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\(^{21}\) TheConversation.com

\(^{22}\) McKinsey
Why do some customers refuse to use the phone?

Every day, potential customers or clients are visiting your website, seeking solutions to their problems. They want quick answers, but many would prefer not to pick up and call. Perhaps they’re busy or in an inconvenient location. Or maybe they have phone phobia, choosing to send an email, reach out on social media, or do anything other than make a call and speak out loud to another person.

Phone anxiety is more common than you may realize. It’s especially prominent among younger generations, but it can affect anyone. For example, the Conversation reports, “61% of millennials would completely avoid calls, compared with 42% of baby boomers.”

For simplicity’s sake, let’s say that 60% of your website visitors call your business, and you receive 12 phone calls per day. That means there are another eight customer interactions per day you’re missing. Multiply eight by 365, and that’s the equivalent of 2,920 ignored potential customers.

\[8 \times 365 = 2,920\]

Now, consider how many leads you convert into customers and the value of a new customer or client.

Again, for the sake of this exercise, we’ll assume you convert 25% of leads, and a typical customer brings in $250. Ready to see what those missed connections cost?

\[2,920 \times 25\% \times 250 = 182,500\]

That’s right: if you can find a way to connect with interested prospects who don’t call your business, you could gain nearly $200,000 every year.

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23 Salesforce
Live chat operates as a virtual greeter for your business and proactively offers support to visitors. Just like a virtual receptionist, a chat specialist can answer common questions, collect contact details, and assist in identifying new customers. It’s an ideal option for customers who...

a. Feel anxiety about calling a business
b. Need to multitask while gathering details
c. Want to address questions before calling to complete the transaction or sign up for your service

A NOTE ABOUT RESPONSIVENESS

We can’t stress enough that, while it’s essential to offer multiple channels for customers to connect, you must set up your infrastructure to support each one. 75% of customers expect help within five minutes—that’s a tall order for many small businesses. Suplementing your team with a communication solution like Ruby helps you expand your options to customers and creates a great experience that doesn’t overwhelm your team.
2 Collect the information necessary to follow up and convert leads.

Customers are 100% focused on getting the information they want or need when they contact your business—they’re rarely thinking about the next steps. That means it’s up to your business to lead the way in terms of establishing a long-term relationship.

Depending on your product or service, some of your leads may convert to customers during a call or chat, while others will need additional follow-up. Others may decide they don’t need your solution now but may contact you again down the road or refer someone else your way.

No matter where a potential customer is in their buying journey, be sure to take advantage of every opportunity to convert them to a paying customer. Here’s how a solution like Ruby can make that easy:

**Gather intake information.**

Our virtual receptionists and chat specialists engage in naturally flowing conversations that gather necessary details without feeling intrusive. As a result, potential customers are put at ease, and you receive the information you need to have an informed follow-up conversation. Examples of intake questions include full name, email, phone number, as well as the best time to contact, type of service requested, and more.

**Schedule meetings or consultations.**

Businesses and professionals of all kinds lose untold hours every week arranging appointments and coordinating schedules. Ruby works with your preferred calendaring system through your website, saving you time and creating an exceptional experience for your customers. Send us the URL to your online calendar along with a few details, and we will complete the form for callers while on the call. For live chat visitors, we are happy to pass along the link for their use.

**Connect chat leads over the phone.**

With Ruby’s call-connect feature, our team can connect your live chat leads directly to your team via the phone. This feature is handy if you have a quick sales cycle or have no sales team to help qualify leads. When a new lead chats in on your website, our chat specialist connects with them and gathers their details. We then send that information over to our call-connect team, which calls the visitor and lets them know we’re following up on their chat request. Once we’ve connected, we give you a ring and send the lead through to you directly!

**Tag calls and chats.**

Seeing at a glance whether a communication needs immediate attention—versus having to read every message or listen to every voicemail—can save valuable minutes in your day. Using Ruby’s proprietary technology, our team can tag incoming calls and chats as a lead, current client, solicitor, or employee. Additionally, we label chats as actionable or non-actionable support, recruitment, or spam.

When you view your activity, you can filter by a specific tag to follow-up only on leads or actionable support while saving current clients for later in the day.
Create a great experience that will result in conversions and repeat business and referrals.

All the marketing and tools in the world can’t replace the value of delivering excellent service that results in a meaningful, human connection.

More than 80% of customers say a company’s experience is as valuable as the company’s products and services. And great experiences have a ripple effect beyond just one satisfied customer.

Delivering a great experience starts by building trust. Customers are in a vulnerable position when they reach out. Maybe they’re going through a divorce, or their basement is flooding due to a burst pipe, or their child needs braces—whatever is going on, their need for your services may be an emotional and financially fraught situation for them. By providing communication options and being quick to respond, you establish your business as reliable and ready to help, easing a customer’s anxiety and decreasing the likelihood they’ll evaluate your competitors.
You have the power to create extraordinary, personal experiences for everyone your business serves. And with the right mindset and tools, you can do it while boosting efficiency, saving time, and making the most of your productive hours at work and leisure time when you’re off the clock. It all adds up to repeat business and referrals, taking the stress out of growing your business.

A virtual receptionist solution makes it possible. As we’ve explored in this guide, a solution like Ruby...

- Provides a seamless experience for your customers or clients
- Reduces operational costs
- Eliminates frequent distractions
- Works flexibly to meet your business’s changing needs
- Gives you more control over how and when you connect
- Collects useful insights about your callers and website visitors
- Optimizes customer experience 24/7
- Captures more opportunities and more revenue

The result: happier customers, efficient businesses, and a more human, accessible, connected world. Ready to make it happen?

Get started with Ruby today.
844–311–RUBY (7829)
www.ruby.com