

Allstate Insurance Agency Boosts Business by Switching Phone Service to 8x8 Cloud Communications



Can the type of phone service you're using have an impact on the success and growth of your business? Believe it or not, it can. Just ask Allstate agent Scott Bowen, who discovered this when he decided to move from traditional landline phone service to 8x8's cloud-based, hosted VoIP (Voice over Internet Protocol) business phone service for his office in Idaho Falls, Idaho.

Cloud Communications: More Features for Less Money

Every Allstate agent knows that providing outstanding customer service is key to running a successful business. But for Bowen and his staff, relying on traditional landline phones made it difficult to deliver that level of service.

"We were using four-line phones and the setup was kind of confusing," he recalls. "But the worst thing was that we were really limited in what we could do to assist customers on the phone."

One major problem was that Bowen's office had no "warm transfer" capability. That meant he and his employees could not stay on the line to ensure a successful handoff to the transferred party. In addition, callers on hold did not hear soothing music or helpful messages; instead they heard annoying beeps every few seconds.

"The service we had was expensive and not very efficient," says Bowen. "It didn't work well for either side."

So when Bowen heard about the advantages of lower cost cloud-based phone service, he decided to check it out. What he found was that he could get a lot more functionality for less than he was paying the local phone company, and his business realized the cost savings right off the bat.

"We went from two lines to three for the same price! 8x8 Virtual Office is much more cost-effective than traditional phone service."

But price wasn't the only benefit. Bowen's 8x8 service also provides advanced business features that enhance both customer service and agent productivity, far beyond warm transfers and music-on-hold, which are standard with 8x8 cloud-based business phone service.



Customer: Scott Bowen,
Allstate agent

Industry: Insurance

Locations: Idaho Falls, Idaho

8x8 Products: Virtual Office

Number of phone lines: 5

Favorite 8x8 Features:

- eAgent integration
- Auto-forwarding to Allstate
- Mobile app
- Internet fax
- Call recording



“I don't even have to dial the phone anymore—I just click to call any of my contacts. And because eAgent automatically pulls the customer's record when they call, I can immediately click to bring up the policy. Being able to see our customers' names and policies helps us be more professional when handling their calls.”

—**Scott Bowen**
Allstate Agent

eAgent Plug-in Enables Professional Call Handling

8x8 Virtual Office business phone service integrates with the eAgent agency management system to deliver customer account information right to the desktop. Now when a customer calls the office, an account record automatically pops up on the screen so Bowen and his employees can see who's calling and immediately assist them. The eAgent plug-in also makes it easy to dial directly from the web browser. With one click, Bowen and his team can make calls directly from their desktops—no manual lookup or dialing required.

“I'm getting lazy because of eAgent,” jokes Bowen. “I don't even have to dial the phone anymore—I just click to call any of my contacts. And because eAgent automatically pulls the customer's record when they call, I can immediately click to bring up the policy. Being able to see our customers' names and policies helps us be more professional when handling their calls.”

Make Your Office Mobile—Without Extra Charges

Although Bowen spends most of his work day in the office, he sometimes needs to work remotely. When he does, the 8x8 mobile smartphone and tablet app (included free with his service) lets him bring the office along.

“With the mobile app, I can make and take calls on my cell phone as if I were in the office,” explains Bowen. “My caller ID is the same as when I call from my office phone, so no one has a clue where I am. Customers don't even realize I'm not at my desk.”

Another big advantage of the mobile app is that it allows Bowen to use his cell phone as an extension of his low-cost 8x8 service. That means he doesn't have to pay high cellular rates for roaming when he uses the phone while traveling.

“It's great when I'm out of town and need to make business calls,” he says. “I can use my phone without running up extra charges or running out of minutes.”

Bowen can also simply forward calls to his smartphone when he steps out to do a quick errand.

“With 8x8 business phone service, you never miss a call. You take the office with you wherever you go.”

Effortlessly Forward After-Hours Calls

Like every Allstate agent, Bowen is required to forward after-hours calls to Allstate's 24-hour customer service center. With traditional telephone service, he and his staff had to do this manually—and then remember to reverse the process in the morning.

“It wasn't a big deal, but it was one more thing we had to do at the end of a busy day,” says Bowen. “Then we had to change the phones back as soon as we got into the office or our calls would continue to be forwarded.”

Now with 8x8, after-hours calls that come in between 8 p.m. and 8 a.m. are automatically forwarded to Allstate's customer service center—and Bowen doesn't have to do a thing.

“Our 8x8 service lets me set up a call-forwarding schedule for the office. Once it’s done, the phones switch back and forth automatically. It’s a timesaver for us, and makes ending and starting the business day much smoother.”

When Bowen needs to modify the call-forwarding schedule for his office, he just logs into a web-based administration portal and makes the change.

“The self-service portal is very user-friendly, so it’s easy to go in and make whatever adjustments we need,” says Bowen.

Internet Fax and Call Recording Streamline Workflows

8x8 service also supports electronic faxing over the Internet. For Bowen, this feature has become a must-have.

“I love the built-in Internet faxing capability!” he exclaims. “Our old fax system was horrible. We were never sure whether faxes went through, and we constantly missed incoming faxes.”

Using Internet faxing, Bowen can now send and receive faxes from his desktop, just as he does email attachments. When a fax goes out, the system sends an email confirmation that it was transmitted successfully. When a new fax comes in, the system sends an email notification with the fax attached so he can view it immediately.

“Internet faxing saves me a lot of time,” says Bowen. “It lets me see everything in one place, confirms that faxes have gone out, and notifies me right away when faxes come in. It’s a huge improvement over what we had before.”

Call recording is another advanced feature that has streamlined Bowen’s workflow. He can record any call just by pressing the **Record** button on his IP phone or clicking the **Record** button in his desktop interface. The recording is automatically time- and date-stamped, and then stored as an MP3 file.

“I use the call recording feature when customers cancel their policies because it’s as good as a signed piece of paper,” he explains. “I attach the recording to the customer’s policy in case there any questions later. It expedites the cancelation process for the customer, while making sure we properly document the termination of coverage.”

Advanced Phone Features Improve Responsiveness

Bowen has found that many of the advanced phone features included with 8x8 service help improve his responsiveness to customers. For example, he uses the simultaneous ring feature to ring every phone in his office when a call comes in. This ensures that customer calls are answered as quickly as possible by whichever team member is available.

Three-way calling comes in handy when Bowen has a customer on the line and needs to involve a mortgage broker.

“Three-way calling lets me continue assisting the customer without having to hang up, consult with a broker, and then call the customer back again,” says Bowen. “It elevates our customer service delivery.”

Email notification of voicemail gives Bowen and his staff an instant heads-up when they have new voice messages. A copy of the message is also attached to the notification, so they can listen to it immediately, without having to dial into the voicemail system. Bowen does this when messages arrive while he’s on another call.

“If I see a message in my inbox, I’ll put my current call on hold or mute and listen to it right away. If it’s urgent, I can have one of my employees call the customer back ASAP. It makes us more responsive to customers when they leave voicemail.”

As a business owner, Bowen also regularly checks his 8x8 call logs to see how many calls are coming in and how many his employees are making.

“My employees work hard to serve our customers, and the call logs definitely show that!” he says. “With our 8x8 service, I can check the call logs whether I’m in the office, working at home, or on the road. It helps me stay on top of my business at all times.”



I am extremely pleased with our 8x8 service. The price-point is incredible, and there is so much you can do with the system. I would never go back to traditional phone service. Every Allstate agent should switch to 8x8!"

—**Scott Bowen**
Allstate Agent

"Every Allstate Agent Should Switch to 8x8!"

Looking back over his two-and-a-half years of 8x8 service, Bowen has no doubt that his decision to give up traditional phone lines was the right one.

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Find out how 8x8 can help your business. Call **1.866.862.2811** or visit **www.8x8.com**

