

SELLING 3CX[®]

COMMUNICATION SYSTEM



This PDF covers all you need to know
About the selling process of a new PBX
system, including:

Understanding a customer's decision process

Required features

How to design a good system

Maximizing sales as a key to your success

UNDERSTANDING A CUSTOMER'S DECISION PROCESS

Use the following questions to guide the initial conversations with your prospect and uncover their needs.

Why does the customer want a new phone system?

The most common reasons a potential customer looks into investing in a new system are:

1. The opening of a new office
2. Upgrading to a modern unified communications system
3. Current system is too expensive to upgrade and expand
4. High maintenance costs

How is their current system used?

It is important to understand the customer's current situation thoroughly in order to cover all points at a later stage in your proposal. Finding out more about how they currently work will eliminate the risk of any blind spots later on!

- How many extensions do they have?
- How many locations does their business have?
- Does their staff work remotely?
- How many agents are in their call center?
- Do they use any CRM?
- How do they connect with their remote offices?
- How do they measure performance and productivity?
- Is quality of service measured? How?
- Do they use any PMS?
- What third party software do they use for their communications? Examples:



What are the customer's pain points

- What needs are not being met?
- What issues are the users facing?
- What obstacles is the PBX admin facing?
- What are the current costs of calls?
- What is the overall cost of the system?
- How is this affecting the business overall?

What are their new system expectations?

Make sure you have a crystal clear picture of how the customer envisions their new solution to be. This will ensure customer satisfaction upon delivery.

- What features do they want to keep from their existing system?
- Are they looking to cut costs?
- Do they want to re-use their existing hardware?
- Are they keen on adding mobility features to increase productivity?
- Are they trying to improve customer satisfaction?
- Do they need new features such as messaging, chat, Facebook and WhatsApp integration etc?

"It only took one week to get 3CX up and running, and the results of the switch were noticeable right away. The implementation was seamless and we couldn't have hoped for a better transition."

Enmanuel Leonis

OPERATIONS SUPERVISOR AT PWC VENEZUELA

CUSTOMERS' REQUIRED FEATURES

Customers will request features based on what they know to be available, however as a 3CX Partner you can advise them on topics they could have missed! You could suggest they utilize certain features included in 3CX, which they are completely unaware of. Plus, you get to upsell your services by doing so!

3CX Call Flow Designer

Take their customer service up a notch with the 3CX Call Flow Designer. With this user-friendly, visual app, customers can easily create strategic call flows and voice applications so that agents can more efficiently handle calls and customers can get to where they need faster.

Here are a few examples below:

- Call routing based on customer authentication
- Automatic outbound dialler
- Callback scheduler
- Credit card authentication
- Phone orders
- Surveys
- Automated 'Text to Speech' & 'Speech to Text' in 120 languages

CRM integration

3CX CRM integration can improve customer satisfaction, increase staff productivity and save you time. It supports all major CRMs including Salesforce, Microsoft Dynamics, Hubspot and more!

This is how it can help:

- Call journaling on incoming calls and live chat
- Creates a new customer record for new numbers
- Saves agents time searching
- Call logging in your CRM records - even when using 3CX Apps!

Facebook Messenger integration

- Sync with Facebook business page - All messages are sent to the Web Client
- Agents can answer customer queries without needing access to Facebook
- Forward messages to a queue with multiple agents
- Chat reports available per agent and queue

WhatsApp integration

Manage WhatsApp Business company messages directly from the Web Client, Desktop App and smartphone apps and have all customer communications in one place:

- Messages are logged, to ensure no response violates company policies
- Staff do not need to give out their personal WhatsApp numbers
- Chat conversations are logged centrally
- WhatsApp messages can be sent to a queue of agents to share the load

Business SMS / MMS integration

- Used to send SMS / MMS to customers
- Route SMS to multiple agents so no message goes unanswered
- Keep personal mobile numbers private

3CX Live Chat

- Chat with customers directly from website
- Create chat queues
- Answer from Web Client or 3CX App
- Transfer chats to other team members
- Elevate a chat to a call or a video with a click
- Chat reporting available
- Chat monitoring feature for managers!

3CX AI

- Monitor sentiment by call, agent, queue, and ring group
- Use sentiment trends to guide training and improve service
- Use AI Call Summaries to Improve follow-ups with clear, concise context
- Speed up issue resolution - no need to review full call recordings

These are just a few examples, but there are [more features to be considered](#).

HOW TO DESIGN A GOOD SYSTEM

After discovering the pain points and expectations of the customer, let's investigate their hardware requirements.

Existing phone lines

- Do they have existing T1 / E1 lines that they wish to keep? - Does the customer have existing digital or analog phone lines? Do they wish to keep them? If yes, a VoIP Gateway will be required. We recommend that if there is good internet connectivity you attempt to migrate the customer to certified SIP trunks, rather than installing a VoIP Gateway
- Do they have existing SIP trunks that they wish to keep? - Does the customer have an existing SIP trunk? If they do, and it is not certified by 3CX, emphasise the benefits of moving to a certified SIP trunk
- How many inbound lines do they have and do they need more lines added?

Peripheral hardware

- Do they need conference room phones?
- Do they need a door phone?
- Do they have a need for paging and intercoms? This is very often overlooked in modern SIP systems and yet popular with older legacy systems

Remote offices or users

- Will there be remote users? Will they use 4G / Broadband?
- Will there be branch offices to add to the system?

Phones and headsets

- How many extensions do they currently use? Will they need more?
- Always recommend [3CX Supported Phones](#). Even if you manage to configure an unsupported phone, this could create issues later on and an extra overhead. Be aware that old legacy phones are harder to configure, have potential security issues and will never have the same usability as a modern phone. Which phone models do they like? Which users require executive phones?

- Do the users need headsets? This is a nice, high margin add-on sale
- Are any users particularly heavy speakerphone users?

Fax

- Does the company still use fax?
- 3CX Fax Server allows you to receive inbound faxes in PDF format and forward them to one or multiple extensions. In order to send outbound faxes, a fax machine or server will be required. Info can be found [here](#).

Cloud or on-premise?

- Would they be more inclined to be hosted in the cloud? **Hosted by 3CX** is a great option for customers up to 750 users, it saves costs for the customer, plus takes away the administrative overhead for you. 3CX can also be hosted on a private or public cloud. Or maybe the customer prefers an on-premise PBX. Installing 3CX on a mini appliance or as a virtual machine on an existing server is sufficient for many companies and can be much less expensive.

“Standardize, Standardize, Standardize”

We strongly recommend that you standardize on a particular phone brand and SIP trunk for all your customers. Resist the request from your customer to use their own SIP trunk or old legacy / special phones. It will make it much harder for you to support your customer base. Decide on a brand of phone and a SIP trunk and build good relationships with those vendors and get to know the brands.

MAXIMIZING SALES AS A KEY TO YOUR SUCCESS

3CX gives you plenty of opportunities to add value with peripheral hardware and a whole host of integration options available. Here are all the elements that need to be included in your final proposal to the client.

The site survey

Conducting a survey of the current network and office environment is integral to proposing a new phone system and providing an accurate quote. The main issues you will need to take note of during the site survey are the following:

- Do they operate an analog system or is it IP-based?
- Is the network VoIP-ready? At least for the LAN?
- Do they have PoE switches?
- Do they have a VoIP-friendly firewall? Can you get access to it to make port forwarding rules? Are you able to switch off SIP ALG?
- Does the customer have adequate internet speed to be able to support remote users, branch offices, or VoIP service providers?
- Do they already have an existing server with enough capacity to add an extra VM?
- If they do not already have one, does the server rack have room for another server?
- Do they have any existing SIP Phones that can be reused?

Planning the proposed system

Hosted, private cloud or on-premise?

- Less than 10 users & looking for a set and forget option? Propose 3CX SMB FREE
- More users but wanting zero management? Propose a *Hosted by 3CX* dedicated system
- In a private cloud managed by the IT admin? 3CX dedicated subscriptions can be self-managed on Amazon, Azure, Google & more
- On-premise? 3CX can be installed on Windows / Linux (Virtualized with VMware, Hyper-V or KVM)

Note: 3CX subscriptions can be easily upgraded- in place and immediately - directly from the management console or your reseller portal if the key is linked to your account. Only the difference in the subscription price will be charged! No penalties!

Which 3CX License?

- 3CX SMB FREE is up to 10 users.
- Dedicated PRO or Enterprise subscriptions are based on the number of simultaneous calls

Number of SIM calls

For dedicated subscriptions, find out how many calls the customer will need during maximum usage so that you can quote the correct 3CX license. 3CX Dedicated is not licensed by number of extensions but by number of concurrent calls - including internal calls. As a rule of thumb you can use the following formula.

Number of internal extensions

You can find our online calculator [here](#) to provide an estimate for the license size required. This may vary for higher than average call volumes. If you would like more guidance, please contact your 3CX Account Manager for assistance.

Which 3CX Edition?

- **SMB FREE** - Include core PBX features, video conferencing, live chat & WhatsApp integration. Up to 10 users
- **Dedicated PRO** - Add SIP trunk, multi-level IVR, call queues, call and chat reporting, CRM integration and more
- **Dedicated Enterprise** - Adds skill-based routing, failover, call recording control, corporate branding (Logo on IP Phone)

Find out more about the differences between versions from our [features comparison page](#). You can upgrade a customer to a higher edition or additional sim calls at any point directly from your reseller portal.



The quote

Writing the quote should be a thoughtful process. There are many small things to consider that might not have been immediately thought of.

- Do you have to remove and dispose of the old system?
- Did you take into account the time needed for installation? You need roughly one minute to unpack and assemble each phone. If your customer requires 60 new phones that is an extra hour of billable time
- Will there be a need to work outside of normal business hours? Often businesses can't afford to have their communications systems down during office hours and would then require you to deploy the new system after hours or on a weekend
- Have you discovered if the system is powered by 'Power over Ethernet' (PoE) switches or will you need to purchase AC adapters for the phones?
- Does the customer require any training on how to use the new system? Remember to allocate enough time for user and admin training

Did you include a support agreement?

Support agreements are a key piece of recurring revenue that you should not miss the opportunity to have with your customers. Locking customers into these agreements is what traditional telephony resellers have been profiting from for years and you should be too. Support agreements can be customized for each individual customer's needs. Some of the items that can be added to the agreements can be:

- Emergency support
- Set number of maintenance hours per month
- Extended hardware warranty

Annual contracts are the best options. Try to get one whenever possible and ensure it is an automatic renewal. In the end you decide the contents of your support packages. They can be as comprehensive or as simple as you want to make them.

Did you offer a leasing package?

Leasing is a good option to help close sales. Customers are not having to buy phones outright and can easily upgrade after set term periods have expired. This allows them to get financing easier and it preserves their line of credit. Instead of having to pay thousands in one initial payment, you can offer them the ease of low monthly payments. This makes it more affordable to the customer and gives more revenue to your business.

Did you include training?

Training is the last major time expenditure for each customer's installation. It is essential to ensure the system is used efficiently. If you install a new phone system and leave the customer to sort it out for themselves, chances are they will not be as happy with the system because they won't know all the functionalities.

To save you time on the phone it would be beneficial to provide some materials for your customers to reference once you leave. The take home materials are important for later reference, but it is still good to conduct training when on-site. Taking between 10-20 participants at a time and walking them through the features that they will be using on a daily basis, gives them the tools to be able to use the system you deployed in the most efficient way. This involves mock video and audio conferences, accessing voicemail and setting up meetings.

Admin training is just as important. Take some time to sit with the person that will be in charge of setting up extensions and the behind the scenes actions, if that isn't you, and get them trained so they won't need to call you as much when changes need to be made. The same goes for the receptionist. They will be dealing with more of the features the system has than the average staff member. Just like the admin training, this will give them the tools to be confident with their new phone system.



Demo 3CX in action

- Install the app on the customer's phone and provision it with QR code
- Show them your best looking IP Phones
- Use the free license key to setup a live trial for the customer

The deployment - preparing for the installation

The quote is complete and the customer has agreed to the work involved, now is the time to actually do the work. Preparation is key for deployment. Before you deploy at a customer:

- [Install](#) 3CX in house and familiarize yourself with it
- Follow the [3CX Basic training course](#)
- [Get certified](#)
- Ensure you use certified [IP Phones](#) and [trunks](#)

Prepare a deployment sheet with the key information you will require during installation - you can use this [example phone system deployment sheet](#). Having the know how and information ready is key for looking professional and for getting the job done.

Sell the right solution, deliver real value

Presenting the right 3CX solution to a customer is not just addressing a technical issue. It's about delivering measurable business value. By aligning the solution with the customer's specific needs, you can help reduce costs, improve customer experience, and increase team efficiency.

This positions you as a trusted advisor, not just a 3CX reseller.

Clear communication of these benefits is essential to closing deals and building long-term relationships.

Deploy off site and test run BEFORE going live

The best way to limit the down time for your customer is to have most things set up before going to their office. This will limit the time they are without a functioning system and will make you look more efficient and professional. 3CX has support staff ready to help if you come across issues during deployment or testing. You can await answers and fix issues without your customer looking over your shoulder and stressing you out.

The follow-up meeting

The purpose of this meeting is to make sure everything is working as it should be and that all staff are feeling comfortable with the new system. More importantly it ensures a happy customer and a good reference for future work.

"We started selling 3CX in 2010 with the release of version 9. 3CX is a modern system that isn't tied down to having to support legacy digital telephone sets like Avaya and Mitel. We find 3CX an excellent fit for all businesses; very feature rich with an excellent ecosystem of existing third-party applications, as well as an architecture where custom add-ons can be built to meet the needs of any business."

Jonathan Rapoport

PRESIDENT AT 1ST CHOICE BUSINESS PHONES