

Your CX technology integration roadmap.



Technology integration is where the rubber meets the road in any customer experience (CX) transformation. Knowing potential hazards, roadblocks, and time-saving shortcuts will help your integration go as smoothly as possible.

Here are some best practices to guide your integration journey.



Have a clear destination in mind.

Every technology decision should serve a larger strategic objective. Because growth without clear direction isn't scaling, it's chaos.



Say you're a new fintech company banking on a vision for data-driven personalization. Making concierge service a key strategic differentiator, you prioritize API integrations that enable quick and smooth exchange of information with your database management platform. With real-time access to customer journey data, you can also deploy AI-guided agent software to predict customer behaviors and preferences that agents can use to personalize recommendations.




71%

of consumers expect personalized interactions with companies, 75% of whom get frustrated when it doesn't happen.¹



Watch out for one-way streets.

Rigid platforms, systems, or partners can lock you in and limit your flexibility. Consider platform-agnostic approaches that work with any system or technology with accessible API keys.



Take a retail startup, for example. Given seasonal changes in consumer demand, the company needs flexible technology and staffing solutions that can ramp up teams quickly, scale up or down, and work with other technologies as strategic plans and efficiency goals evolve. One Ubiquity client finds success through this malleability. Depending on the time of year, they fluctuate between 150 and 250 outsourced staff, always having the number they need for the season.

10 minutes or less
is the response time consumers expect from their customer-service inquiry.²



Prioritize safety in every direction.

Look for solutions that maintain encrypted client data at rest, in transmission, and in transit. Feel confident knowing all data storage and management practices exceed industry standards, with physical access restrictions and built-in redundancy to guarantee uninterrupted customer service delivery.

Picture a healthcare payer brand that needs to protect patient data—and their good name—while improving claims assistance. They integrate the Ubiquity inTouch® platform to unify channels and Aigent software to deliver a more coordinated and personalized claims experience. The whole environment is protected by a comprehensive, HIPAA-compliant security program.

\$8 billion is how much consumers reported losing to fraud in 2022, an increase of more than 30% over previous year.³





Take proven routes.

Work with a partner who can extend your technology with theirs. Depending on your industry and objectives, prebuilt partner integrations can help you ramp up and scale a custom solution quickly.

Imagine you're a tech startup worried about keeping early adopters excited about your services. To maintain high-quality interactions, you incorporate inTouch communications, automated data collection with interactive voice response (IVR), and AI-driven Aigent guidance to deliver a smooth and accurate onboarding experience. All solutions leverage prebuilt, customizable integrations with a large number of service providers.

14%/hr is the amount AI assistance could increase agency productivity.⁴



Drive performance with data.

CX programs have grown increasingly complex, with more touchpoints and moving parts than ever before. The more you can integrate technology now that can capture and analyze data from various touchpoints, the better your ability to get a real-time picture of what's working and what's not.

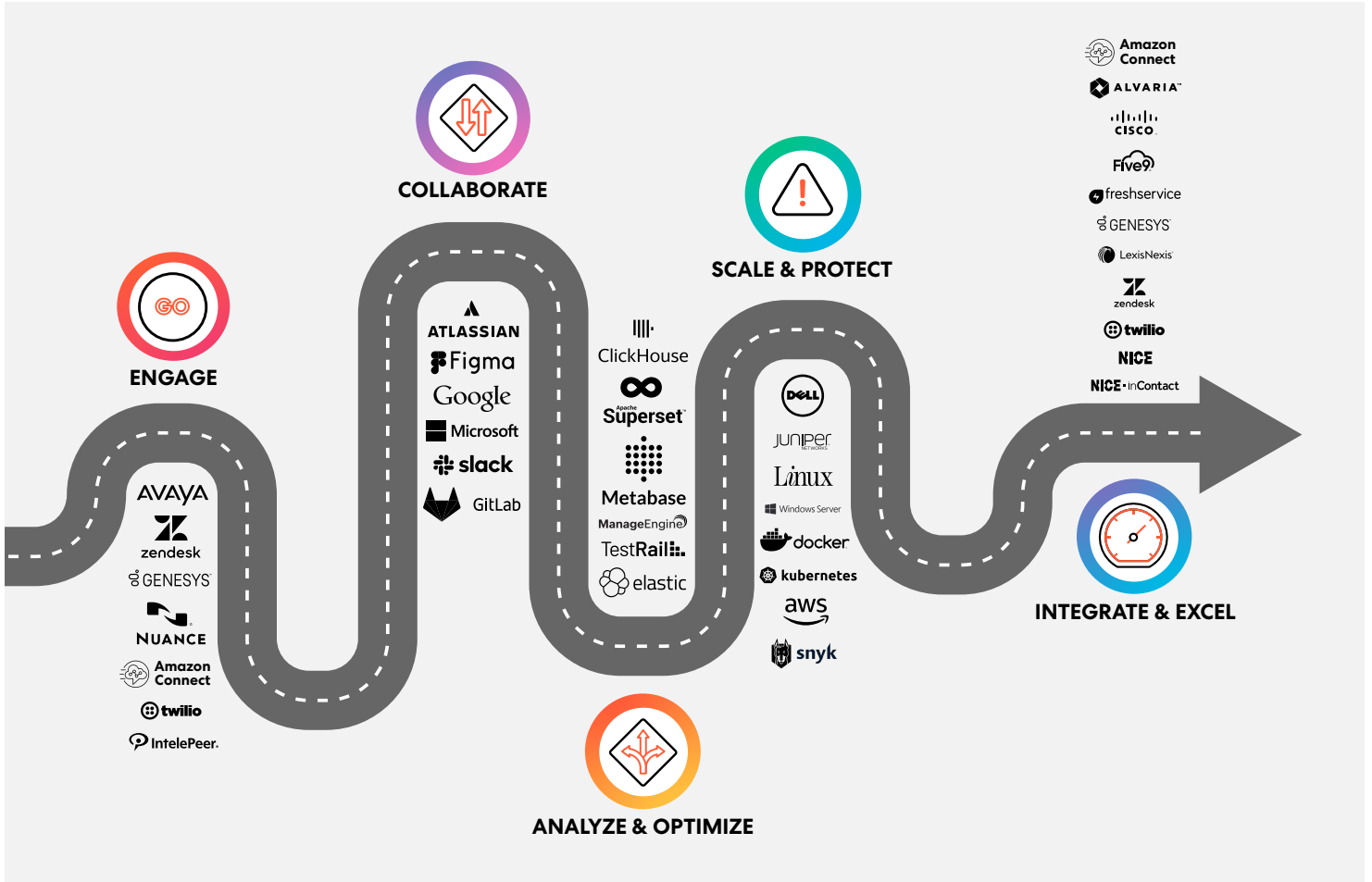


For example, an insurance business wants to build trust and loyalty with policyholders. Integrating Ubiquity inTouch into their database management systems helps to connect agents, claims reps, and other staff with the most up-to-date information. With unified policyholder profiles and cloud-based AI software like Aigent, they introduce a new level of intelligent, real-time guidance to their telephony and customer relationship management (CRM) solutions.

91% of consumers say "a positive customer service experience makes me more likely to make another purchase."⁵

We partner with **you and proven industry leaders.**

Many technology integrations require very little effort from our clients. We'll work with what you have, drawing from our broad experience with various technology partners to help you transition seamlessly, whether the final platforms are yours, ours, or a hybrid model.



“Ubiquity’s expertise helped ensure that we launched with full confidence, not only in our mission-driven products and services but in the overall support infrastructure we built.”

—Hussein Ahmed, Founder and Chief Product Officer, Oxygen

The **Ubiquity advantage**

When you choose Ubiquity, you choose an integration partner committed to your success. Our technology-agnostic approach and custom integrations allow you to harness the full potential of your technology investments while ensuring a seamless experience for all of your customers.



Reach out to discover how our technical integrations work smoothly for any business.

1. <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/the-value-of-getting-personalization-right-or-wrong-is-multiplying>

2. <https://blog.hubspot.com/sales/live-chat-go-to-market-flaw>

3. <https://www.statista.com/statistics/273550/data-breaches-recorded-in-the-united-states-by-number-of-breaches-and-records-exposed/>

4. <https://hai.stanford.edu/news/will-generative-ai-make-you-more-productive-work-yes-only-if-youre-not-already-great-your-job>

5. https://c1.sfdcstatic.com/content/dam/web/en_us/www/documents/research/salesforce-state-of-the-connected-customer-4th-ed.pdf