

Approved Contact Case Study

Approved Contact helps financial services company improve customer communications and satisfaction with Text Bot for Microsoft Teams

The challenges of implementing business text messaging

There are many obstacles to overcome when implementing business text messaging, including integrating messaging with other systems, ensuring content maintains compliance and confidentiality, and more.

Text Bot for Teams makes text messaging business-friendly

A major financial services company implemented Text Bot to simplify the exchange of documents between customers and sales reps. Now employees use Teams for customer communications.

Boosting collaboration and client satisfaction with Text Bot

With Text Bot, a team of more than 100 salespeople went from sharing 20 mobile phones to every salesperson having a dedicated number that delivers text messages to their Teams client.

Microsoft
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Approved Contact delivers solutions that help companies improve productivity and collaboration

A Microsoft partner for more than six years, Approved Contact is an ISV that provides collaboration solutions for Microsoft Teams, Office 365, Exchange Server, and more. With a mission to help all businesses improve productivity, Approved Contact lists several of its products in the Microsoft commercial marketplace, including its Approved Contact calendar management solution and its Text Bot text message integration for Teams. Companies large and small use Approved Contact's solutions across all major verticals.

A financial services company trusted by more than 25,000 businesses for their merchant processing needs wanted to transform the payment processing landscape with a merchant-first approach. Its sales team was sharing 20 mobile phones among more than 100 representatives to communicate with customers and needed a way to optimize the exchange of documents between salespeople and customers. The company reached out to Approved Contact to implement [Text Bot](#) for Teams.

Text Bot for Teams makes text messaging business-friendly

While many businesses want to allow SMS and MMS text messaging as another communication channel for employees and customers, there are many obstacles to overcome. These include how to archive messages, how to pass messages between employees easily, how to ensure message content is compliant and does not leak confidential information, and how to integrate text messaging with other software such as CRM, help-desk ticketing, and call center systems. Approved Contact's Text Bot overcomes these obstacles by using Teams as the central point of control for text messages sent to and from businesses.

With Text Bot, every sales representative at the financial services company now has a dedicated number that delivers messages directly to their Teams client. Customers can simply text their monthly transaction summaries to a sales rep and get a competitive offer for moving their credit card processing. Text Bot receives the content over text and delivers it to the appropriate Teams channel, where it is easy to collaborate on the transaction and reply via text message.

"With Microsoft Teams and the Text Bot, sales representatives are now just as effective when working from home as they were when they were in the office," said Doug Worth, Vice President Product Support, Approved Contact. "And clients love the added benefits of text messaging."

Text Bot for Teams has helped significantly reduce mobile phone expenses while optimizing communications and boosting customer satisfaction.

"Microsoft Teams is a great platform to use for managing and archiving text messaging because it is already deployed inside of companies for messaging. Adding text messaging into Teams is an easy decision."

- Doug Worth, Vice President Product Support, Approved Contact