

AXIO FINANCIAL

Since 2010, Axio Financial has been leading the way in using SaaS and cloud-based services, working with best-of-breed technology partners such as Vonage to help scale and innovate business workflows and operations throughout their entire structured products lifecycle.

Challenge

Axio's substantial growth required them to build a next generation platform, including a full featured contact center, that would integrate key strategic, application, and communication solutions to enhance user functionality and support their expanded business demands.

Solution

A combination of the Vonage Business Communications unified communications service and the Vonage Contact Center's cloud-based call center software for business communications needs serves as a core part of the Axio Acceleration Platform.

vonage.com



Axio Financial Taps Vonage to Make Sales Teams More Efficient

According to a recent survey by Finextra Research, 83% of respondents claim their financial institution's existing core technology can no longer support the company's needs. In an increasingly competitive market, the savviest financial companies are turning to SaaS and cloud-based services as part of their infrastructure. Since 2010, Axio Financial, a U.S. broker-dealer that specializes in selling structured financial products, has been leading the way in making this transition, teaming with best-of-breed technology partners to help scale and innovate its business workflows and operations throughout their entire structured products lifecycle.

Axio's mission is to use data, technology and people to add value throughout the entire structured products lifecycle, which means from idea generation through maturity. This creates a challenge for Axio's sales team to manage such a vast amount of information in a fast and dynamic financial market environment.

"The Vonage Business Communications and Vonage Contact Center solutions have integrated advanced CRM related functionality into the Axio Acceleration Platform in a way that empowers our salespeople to work smartly and efficiently. Vonage has enhanced our flexibility in outbound dialing, provided reliable, high-quality voice functionality and has enabled data integration in our CRM."

- Rick Baff
Chief Information Officer
Axio Financial

Supporting aggressive growth and ground-breaking innovation at Axio Financial

By 2015, Axio had grown so substantially that it needed to build a next generation platform to address the increased volume and diversity of its business. To accomplish these goals, Axio Financial needed to integrate its enterprise database and data infrastructure with strategic application and communication solutions partners to create a full-featured contact center solution to:

- Leverage Axio's advanced data analytics
- Empower the organization's in-office, hybrid and remote staff
- Support broker dealer, bank, and RIA financial advisors
- Allow efficient, fast, and flexible functionality modifications and enhancements

Vonage was the one company that could meet all of the communications platform related criteria. Today, Axio operates using its Axio Acceleration Platform, a custom integration of its enterprise

database with customized versions of the Microsoft, Salesforce, and Vonage platforms. The combined solution leverages Vonage in-office VoIP telephony, advanced analytics empowering flexible real time dial list creation and seamless remote office communications.

Improving Productivity with Mobility Features

With the Vonage Business Communications mobile app, an Axio salesperson is able to work from anywhere with integrated communications functionality, including answering their desk phone on their mobile device and mobile dialing from their desk phone. A single number is all that is needed, whether in the office or out in the field. A salesperson is able to send and respond to customer SMS messages directly, call, answer and transfer calls, and chat with colleagues, all from the one app that resides on their mobile device.

RESULTS

Axio saw a 500% year-over-year talk time uplift for 2018. Outbound dialing attempts increased by 30% in the same period.

