



## UNIVOIP TRANSFORMS THE PHILLIPS GROUP'S COMMUNICATIONS WITH MICROSOFT TEAMS VOICE + COPILOT

The Accounting Firm Saves Executives Hours Daily While Powering Remote Operations With AI

### SUMMARY:

The Phillips Group, an accounting, tax, and advisory firm based in Orange County, CA, sought to elevate its communications stack to better align with its growing, remote-first team. By adopting UniVoIP's cloud-based Microsoft Teams voice platform and Copilot integration, the firm now operates with a unified communications system that enhances collaboration, streamlines workflows, and fully leverages Microsoft's AI and productivity tools.

### THE CHALLENGE:

- The Phillips Group was dealing with a VoIP provider whose desktop and web apps frequently disconnected, creating friction for employees and undermining collaboration as the firm expanded.
- Without proper integration with analytics and AI tools, the team spent too much time on manual post-call documentation and note-taking, diverting focus from client service and strategic work.
- The firm needed secure, centralized communications that could be managed remotely, eliminate desk phones and personal phones for business calls, and integrate with its CRM.



**“UniVoIP's implementation team was there at the drop of a hat, and they have a really strong technical background. It went really smoothly.”**

**- CHRISTOS K.**  
Chief Information Officer,  
The Phillips Group

## UNIVOIP BENEFITS:



Cloud-based calling, messaging, and meetings



Copilot-powered automated note-taking and analytics



No desk phones or on-prem hardware required



Seamless CRM integration



Expert migration and managed services



Dedicated U.S.-based support

## THE ACTION:

UniVoIP recommended that The Phillips Group transition to Microsoft Teams Voice for secure, cloud-native calling and Copilot for automated documentation and analytics. The project included migration services from the previous provider, hands-on onboarding and training, device management, and ongoing support. UniVoIP's team ensured a smooth transition while positioning the firm to fully leverage Microsoft's collaboration and AI capabilities.

## THE RESULTS:

With UniVoIP's unified cloud platform for Microsoft Teams Voice and Copilot, The Phillips Group was able to replace its unreliable systems with a dependable, scalable solution that supports its growth and distributed operations. Thanks to UniVoIP, the firm:



Achieved substantial productivity gains, with one employee saving at least two hours per day previously spent on manual documentation.



Eliminated the need for desk phones and reduced reliance on personal cell phones, establishing more secure and easy-to-manage communications.



Gained reliable voice infrastructure with seamless remote access, improved call management, and CRM integration for faster client service.

## READY FOR MODERNIZED COMMUNICATIONS THAT IMPROVE PRODUCTIVITY?

**Contact UniVoIP** to see how our cloud-native Microsoft Teams Voice solution and integrations can support your growth.

[www.univoip.com](http://www.univoip.com)