

## CB&S BANK+SHORETEL

### CB&S Bank replaces patchwork of PBX systems with comprehensive ShoreTel IP Unified Communications system



#### Disparate system not paying dividends

CB&S Bank had incompatible PBX phone systems throughout its offices. These disparate systems did not work well together and the overall solution was difficult to scale.

#### Unified environment with centralized call center

In addition to a unified phone system, the bank wanted a centralized call center. With plans to add new branches regularly, the bank decided it was time to look at a solution that would offer simplicity of management and provide those capabilities.

"At the time, it was just too much of a challenge to try and get all of the older systems to work together," says Jeremy Scott, IT manager with CB&S Bank. "We started to look at Voice over IP because of its ability to provide a centralized call center and the scalability and ease of integration aspects of it."

CB&S Bank looked at IP telephony solutions from 3Com, Cisco, and ShoreTel®. With priority on call center capabilities, ease of use and management, failover capabilities, and feature richness, CB&S Bank chose the ShoreTel IP Unified Communications (UC) system.

#### Challenges:

Faced with disparate PBX systems across its branches and limited functionality, CB&S Bank decided to switch to an IP Unified Communications system that would provide call center capabilities and ease of use and management.

#### ShoreTel Solution:

ShoreTel provided the bank with an IP telephony solution, including ShoreTel Voice Switches and ShoreTel IP Phones.

#### ShoreTel Benefits:

- Call center capabilities enhance customer service
- Cost savings with ability to manage in-house
- Scalability to keep up with growth
- Cost savings with least-cost routing

"Not only was the ShoreTel system more cost-effective than the rest, it offered us the ease of use and intuitiveness we needed," explains Scott. "ShoreTel also offered more standard features than the other vendors, and proved to be more reliable. We were glad we'd found our IP telephony vendor so quickly and with such certainty."

### **ShoreTel offers the bank a bounty of riches**

ShoreTel Converged Conferencing provides CB&S Bank with rich conferencing and collaboration features. The bank, which had previously been paying a third party to host its conference calls, now has the ability to conduct these calls on the fly. The conference interface also simplifies communications by putting text chat, audio controls, presentation sharing, document files, and application sharing windows into a single display so conference call participants can quickly and easily move between tools.

"ShoreTel has eliminated expensive audio and web conferencing costs with an easy-to-manage solution that we can control," says Scott. "Third party, pay-by-the-minute services are still costly, so this is a significant benefit. And it's so easy to use – employees can quickly and easily set up their own conferences and send outside people the bridge number. It's self-service at its best."

### **Enhanced reliability ensures peace of mind**

ShoreTel's call control software is distributed to every voice switch, which eliminates any single point of failure. The bank has also deployed distributed voicemail servers to provide redundant auto-attendant and voicemail features, ensuring high levels of overall quality of service for the bank's customers. In addition, with ShoreTel Communicator, calls find CB&S Bank employees with the Find Me feature, and powerful messaging features allow voicemails to be sent as attachments directly to their email boxes.

ShoreTel Director, ShoreTel's browser-based management interface, allows the bank's IT staff to gain access to the system from anywhere on

the network. Through this browser, every site and feature can be managed, including the voicemail, automated attendant, and desktop applications.

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Jeremy Scott, IT Manager  
CB&S Bank

With ShoreTel Director, the bank saves significant time and money on employee moves, adds, and changes because with the previous solution, management was outsourced. This meant the company had to rely heavily on its service provider, which took a lot of time and money.

"Ease of use—from the use of the telephones themselves to managing the entire system—is the best thing about ShoreTel," says Scott. "Now I can make changes within seconds, whereas it used to take at least two or three days. And it's a breeze to bring on a new branch or location. And ShoreTel's least-cost routing capabilities also allow us to minimize costs by avoiding toll charges."

### **Tight Outlook integration enables productivity gains**

The ShoreTel UC system, integrated tightly with Microsoft Outlook®, the bank's desktop application, provides integrated messaging, such as directory dialing, contact screen pop, and calendar integration.

## ShoreTel Success Story

CB&S Bank receptionists enjoy an even higher level of functionality with ShoreTel Communicator for Operators, which provides them with critical information necessary for exceptional customer service. For example, when the phone rings, a call-routing log displays for the receptionist the caller's entire experience within the system. Before transferring callers, the call-transfer screen displays information about who is available and who is already on the phone.

### Call Center capabilities enhance customer service

The bank has established two workgroups, one for its call center and the other for its IT Help Desk. ShoreTel's workgroups capability enables the bank to consolidate all its inquiry calls to one number, and calls are routed to the next available call center staff member. Calls to the branches are now answered in the call center, so dedicated receptionists are not needed at each location, allowing the receptionists to be available to perform other tasks. Productivity is enhanced, and customers get treated more consistently. Workgroups also provide basic reporting capabilities to help the bank measure call volume and make work schedule changes as necessary.

"Establishing our call center with ShoreTel was a huge benefit and it immediately enhanced customer service," says Scott. "The call center not only helps us ensure calls are answered by a live person. We're presenting a unified front to our customers and prospective customers. And like everything about ShoreTel, it's easy to set up and change workgroups."

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### Banking on the future

CB&S Bank has grown tremendously since its founding in 1906, and that growth rate is not expected to wane. With ShoreTel, the bank is ready for any number of new locations with the ShoreTel UC system. "We've seen significant improvements in communication and collaboration among staff members already with ShoreTel," concludes Scott. "We are glad we went with ShoreTel and look forward to enjoying and benefiting from its technology for years to come."

## ShoreTel. Brilliantly simple business communications.

ShoreTel, Inc. (NASDAQ: SHOR) is a leading provider of brilliantly simple IP phone systems and unified communications solutions powering today's always-on workforce. Its flexible communications solutions for on-premises, cloud and hybrid environments eliminate complexity, reduce costs and improve productivity.

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