

COMMUNITY BANK & TRUST+SHORETEL

Community Bank puts its trust in ShoreTel VoIP to provide easy management, scalability, and better customer service



Challenges:

Community Bank & Trust, which was growing rapidly, had different telephone systems in each branch. The bank could not centralize communications and there was no consistency across the organization.

ShoreTel Solution:

ShoreTel provided the bank with an entire VoIP system for all of its 12 locations, including ShoreTel Voice Switches and ShoreTel IP Phones.

ShoreTel Benefits:

- Simplified management
- Cost savings due to the ability to handle tasks in-house
- Enhanced productivity and customer service
- Speed of deployment

Disparate systems led to inconsistencies

Rapid growth due to adding new branches and growing established branches was offering meager returns. There was no consistency, and adding new offices was very difficult..

Cost-effective solution that was easy to use

Community Bank & Trust was growing rapidly. With systems in each branch from 3Com, AT&T, Avaya, and Lucent, the organization could not centralize communications, and everybody had different features. In addition, managing the systems was difficult and time-consuming.

“We were unable to move employees from one workstation to another without having an outside vendor come in to rewire,” says Sheila Genske, IT trainer and telecommunications specialist with Community Bank & Trust. “We needed a new system that would allow us to make those changes ourselves and also enable us to easily transfer calls between branches. At the time, if a caller dialing one branch needed someone at another branch, they had to hang up and dial the other number. That’s just not good customer service.”

The bank spoke with its phone company and various local integrators to find out what solutions were available. Eventually, the bank had a list of four vendors under consideration: 3Com, NEC, Nortel, and ShoreTel. The Germantown,

Wisconsin-based integrator brought ShoreTel in for consideration because it was using a Voice over IP (VoIP) solution from ShoreTel throughout its own offices.

The bank prioritized its requirements and decided that it would make its choice based on cost-effectiveness, ease of use and management, and reporting functionality. 3Com and Nortel were too expensive and the NEC system was too new to consider seriously. The local integrator recommended that the bank speak with some ShoreTel customers to hear about their experience and see a ShoreTel demo. These steps sealed the deal, and Community Bank & Trust chose ShoreTel.

Banking on ShoreTel to unify branches and ease management

The ShoreTel deployment and its advanced features started saving the bank money immediately.

For example, ShoreTel Director, ShoreTel's browser-based management interface, allowed the bank's IT staff to gain access to the system from anywhere on the network. It enables every site and feature to be centrally managed, including the voicemail, automated attendant, desktop applications, and automated new-user adds—all in a matter of seconds. This saves the bank significant time and money on employee moves, adds, and changes because they can all be handled in-house.

ShoreTel's least-cost routing capabilities allow Community Bank & Trust to minimize costs by avoiding toll charges. For instance, if an employee at the Sheboygan location calls a customer in Glendale, Wisconsin, the call is routed through the company's data lines, through the Glendale branch, and out to the customer, bypassing toll charges. According to Genske, this feature has significantly cut the bank's long-distance charges.

Community Bank & Trust receptionists enjoy a higher level of functionality with ShoreTel's Operator Call Manager. For example, when the phone rings, a call-routing log displays the caller's experience within the system. With this unprecedented level

of information, operators can not only connect callers faster than ever, but also give them the highest level of professional service.

"You're not just blindly transferring to people – you can see if they are there or if they're already on the phone, and proceed accordingly. In addition, ShoreTel just makes it easy for a caller to quickly locate the person they need. All of these things have really enhanced customer service," says Genske.

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Sheila Genske, IT Trainer and
Telecommunications Specialist
Community Bank & Trust

ShoreTel's advanced features enhance the customer experience

ShoreTel's workgroups enable Community Bank & Trust to consolidate its inquiry calls to various workgroups in customer service, loan operations, marketing, and more. At each branch, operators are also in a separate workgroup and whoever is available answers the call, minimizing the possibility of a caller being sent to voicemail.

Community Bank & Trust also uses ShoreTel's hunt group capability. With hunt groups, when a person is on the phone or unavailable, calls are routed to another extension, preventing customers from unnecessarily reaching voicemail. The ShoreTel system also supports the bank's small group of Citrix users. This allows these users to transfer their extension to their Citrix workstations and access voicemail.

ShoreTel Success Story

Finally, ShoreTel's Auto-Attendant provides 24-hour automated call answering and routing capabilities, and outgoing prompts can be customized and linked to the time of day, day of week, holidays, etc. Individual groups can also have their own menus with unique greetings and options.

"One winter, we had to close early due to bad weather, so I just programmed the auto-attendant from home so the phones wouldn't just ring when a customer called, but it would provide helpful information about the closing and when we'd be reopening," explains Genske. "Customers need this level of information to remain satisfied."

ShoreTel scalability accommodates continued growth

Community Bank & Trust is constantly growing—adding employees and new branch locations. ShoreTel easily scales to meet those growth demands. The bank plans on working with ShoreTel through its growth spurts.

"To bring online the branch we most recently added, everything took about a day – from hooking up phone lines, putting in the ShoreTel gear, and deploying the phones," says Genske. "This would've taken just under a business week with the old system. The ease of managing the ShoreTel system, plus the flexibility to tie multiple branches together, is invaluable to us. We are able to say yes more to our internal employees, and having a great phone system allows us to provide exceptional customer service to outside callers."

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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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