ShoreTel and 1st Security Bank

ShoreTel®

ShoreTel delivers savings 1st Security Bank can count on

CHALLENGE
- *Improve customer service and communications across 13 offices by replacing nine aging and disparate phone systems with a modern, feature-rich, IP-based phone system*

SOLUTION
- *Two ShoreGear® 120 voice switches and one ShoreGear 40 in the main office. One ShoreGear 40 voice switch at each branch, and more than 160 ShorePhone™ 230 IP telephones across the company. ShoreWare® Contact Center and ShoreWare Call Manager applications.*

BENEFITS
- *Direct dial numbers resulted in an approximately 65 percent cost reduction in call center staffing requirements.*

- *Four-digit dialing offers quick and easy access to all staff across all branches, saving time and improving customer service.*

- *ShoreWare Contact Center reports provide valuable planning tools with insight into multiple activities and events.*

- *System manageability reduces costs and saves hours in moves, adds and changes.*

The business of regional banking has changed radically over the past decade. Market forces such as consolidation, regulation, varying workforce needs, new technologies, and increasingly demanding customers, have put pressure on banks to differentiate and create more compelling value. For 1st Security Bank of Washington, this means achieving the optimum information technology infrastructure required to deliver excellent customer service; offer competitive products and services, and provide superior financial support to its customers in the Pacific Northwest.

Headquartered in Mountlake Terrace, Washington, 1st Security Bank has been serving individuals and businesses since 1936; originally as a credit union, but more recently as a Mutual Savings bank.

"We were growing rapidly as a credit union, but regulations meant that we couldn't offer the range of products and services that many of our members were demanding," explained Tony Brooks, IT systems manager at 1st Security. "So we converted to a Mutual Savings bank, and can now do a lot more for local businesses, and invest in modern services, such as online banking, for our individual customers."

With this conversion from credit union to bank came a new challenge: updating the aging hodgepodge of phone systems throughout the 13 bank locations. "We were running nine different phone systems, all of which were different and offered very basic features," Mr Brooks said. As a result, employees often had to look up the number and extension of an employee at another branch, and call outside to reach them. If the print directory had not been updated recently, or a page was missing, this could be very time-consuming and frustrating.

Managing the system was even more frustrating for Mr Brooks: "Just to move the phone for one person could take over an hour," he explained. "It could take several trips to the closet, and a lot of troubleshooting and back and forth."

ShoreTel leads in the IP age
As Mr Brooks began the process of looking at new phone systems, Carmen Ey from reseller *TRI-TEC Communications* suggested he take a look at the ShoreTel UC system. "Since the bank was new to voice over IP, support services were extremely important to us," Mr Brooks said. "Carmen was very responsive to our questions, and understood our needs well, so we followed her advice and included ShoreTel in our shortlist."
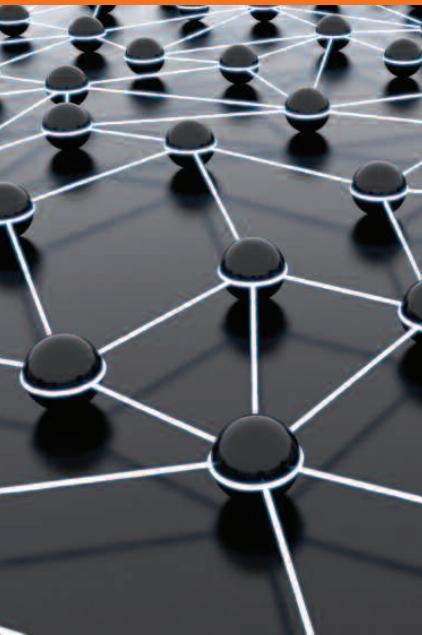
"TRI-TEC Communications guided us through the process with a technician available for each branch. The cut-over was amazingly simple, and we were able to do it all in one day."

Tony Brooks

IT Systems Manager
1st Security Bank

After demonstrations from ShoreTel, Cisco and Panasonic, Mr Brooks eliminated Panasonic and sat down with a task force to match user requirements with the capabilities of both the ShoreTel and Cisco systems. He also made a site visit to another credit union in Seattle that uses the ShoreTel UC system.

"Cisco had many of the same features as ShoreTel; but was much higher in cost," he said. "And once we saw the ShoreTel system in action, there was nothing else the Cisco team could say to dissuade us from going with ShoreTel."

After *TRI-TEC Communications* conducted a network assessment for 1st Security, and the recommendation to deploy a T-1 line was implemented, the bank proceeded with its ShoreTel deployment, installing two ShoreGear® 120 Voice Switches and one ShoreGear 40 Voice Switch in the main office. Each of the 12 additional branches received a ShoreGear 40 Voice Switch, and more than 160 ShorePhone™ 230 IP telephones were installed across all offices.

Flexibility and ease of use streamline transition

"For about three weeks we had both old and new systems running side by side so employees could make internal calls on ShoreTel and learn how to use it," Mr Brooks said. "Everyone found it very intuitive and user friendly. Once we were ready to cut-over, *TRI-TEC Communications* guided us through the process with a technician available for each branch. The cut-over was amazingly simple, and we were able to do it all in one day."

Now all branches are able to use four-digit dialing to quickly reach other employees directly. Plus, most employees have a direct inward dial number which they can give out to customers. This has resulted in a more than 50 percent reduction in the number of calls to the call center, and reduced the amount of time employees at individual branches spend answering phones.

"Before the ShoreTel UC system was deployed, 1st Security Bank needed a staff of about 15 people to handle the number of calls that were coming in from both customers and other branches," said Mia Makanui, deposit operations manager at 1st Security Bank. "Now we need four. That's about a 60 percent cost reduction, right there."

ShoreWare Contact Center helps grow customer base

1st Security Bank is using the ShoreWare Contact Center application to manage the 400 or so calls that come in on the main line every day. Each call center agent is able to process about 80 calls a day, with backup employees available for an additional 20 or 30 calls as necessary. These backup agents receive an alert on their toolbar whenever the call queue turns red. To accommodate Spanish-speaking customers, the bank has set up a separate workgroup which callers can access through the initial automated greeting. This has greatly improved service for these customers, and enabled the bank to attract and service a new customer base.

"With ShoreWare Contact Center, I can see important details such as the number of calls in the queue, how long callers have been on hold, which agents are logged in, who is released, who is not logged in, and how many calls have been abandoned," Ms Makanui said. "If traffic peaks unexpectedly, I can call other employees in to help address customer issues quickly, and we can all be located in different offices which increases the available resource pool."

Call center management has also been greatly simplified. Ms Makanui tracks agent and call center performance each day using the standard reports available in ShoreWare Contact Center. "The information from the reports; such as length of calls, how many rings before pickup, and number of calls, is extremely useful for planning and forecasting," she said. "Plus, I can post reports on the wall so agents can see how well they are doing, and that's a huge motivator for improving customer service."

Hunt groups helps avoid lost calls

In addition to ShoreWare Contact Center, 1st Security is also using hunt groups to help ensure that certain calls are answered by a person. This is particularly important for account executives, who want to avoid their callers ending up in voicemail. "The ShoreTel

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system allows our staff to transfer callers to a hunt group so the call will be answered," Mr Brooks explained. "The caller hears 'Please dial 0 for immediate assistance,' and when 0 is pressed, the call is sent to a hunt group. Each branch serves as a hunt group with every employee participating. This level of professionalism has greatly helped improve customer service and enhance our brand reputation."

All employees are using ShoreWare Personal Call Manager to manage communications, with a few employees using the ShoreTel SoftPhone feature to access business communications using their PC at home. This support for remote workers gives 1st Security additional flexibility, particularly in the event of a bad snow storm when employees can forward calls to their home telephone or mobile number, and work remotely. The ShoreTel system continues to display the bank's caller ID, so customers aren't aware that their financial advisor is not in the office.

"After putting up with so many long numbers to look up and dial, employees are thrilled that now they can access anyone in the company through the ShoreWare Call Manager with just one click," Mr Brooks said. "The name recognition feature means people can be located and contacted quickly, and integration with Microsoft Outlook® puts e-mail, voicemail and all contact information right at their fingertips."

While Ms Makanui likes the feel and functionality in her ShorePhone IP Telephone, she also likes the option of using the ShoreWare Call Manager interface from her PC. "The features are easy to use on either the phone or the PC," she said. "Our call center users really appreciate the flexibility to use whichever method they prefer."

Single image saves time and helps boost productivity

System manageability has helped Mr Brooks realize huge savings in third-party call out

costs, and means he can respond quickly to end user requests. ShoreTel's easy to use system management application, ShoreWare Director, simplifies system management from a Web-based, centralized interface. "Most of our new hires are now in the branches, rather than the main office, but I can easily manage the adds remotely so their phones are up and running, and they are productive from the moment they join the company," he said.

This ease of management also means that Mr Brooks can change the outgoing automated call distribution message on the fly—a feature that is particularly important to the call center which frequently requires changes in response to events and promotions, and improvements to call flows.

ShoreWare Director gives Mr Brooks a single image view of the entire phone system across all branches in an easy-to-manage, intuitive interface, so he can easily check on the status of the system and address any issues. For instance, after one branch suffered a power outage, he was able to reset all the phones remotely in a matter of minutes. Moving phones is just as simple. "We recently had to move about 11 people to new offices," he said. "This used to take about an hour per person. With ShoreTel, it took about three hours to move everyone across."

As 1st Security continues to expand after its transition from a credit union, Mr Brooks sees future opportunities to integrate business processes with business communications on the IP platform. "We're looking at integrating processes and communications at many levels," he said. "ShoreTel has given us a solid foundation to increase efficiency and further enhance customer service. That's an investment that will keep us laughing all the way to the bank."