

## SHORETEL HELPS AMERICAN COMMUNITY BANK SAVE MONEY, SIMPLIFY MANAGEMENT, MAINTAIN OUTSTANDING CUSTOMER SERVICE REPUTATION

### ShoreTel Replaces Nortel at American Community Bank

#### Key Challenges

- Replace cumbersome phone systems that were difficult to manage
- Maximize budgets by capitalizing on Voice over IP
- Ease administration tasks - Simplify moves, adds and changes
- Simplify and enhance communications for employees

#### Benefits

- Thousands of dollars in savings—more than 50%—each time a new branch is added
- Least-cost call routing reduces—and often eliminates—toll charges
- Remote management of equipment at any branch from anywhere
- Single, unified phone system for the bank

American Community Bank is a full-service community bank headquartered in Monroe, North Carolina, with eight branches in North Carolina and three in South Carolina. In order to minimize costs and deliver the excellent customer service for which it has become known, the bank made it a point to capitalize on technology, including voice over IP (VoIP). In 2003, the bank had an individual standalone Nortel phone system at each of its branches, none of which were connected to one another.

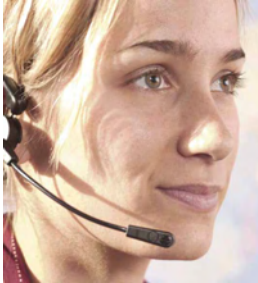
“Our biggest issue at that time was administration,” said Dan Ellis, Chief Financial Officer with American Community Bank. “We had seven branches at the time, which meant seven phone systems to administer. In addition, we needed an outside vendor to handle the administration—we had no control. If we needed to move somebody to a different location, someone had to come in to make the change.”

American Community Bank decided it was time to upgrade its existing phone system and turned to the leading VoIP technology providers, including Cisco, Intertel, and ShoreTel. Priority was placed on simplified management and ease of use. After careful consideration and speaking with a number of customer references, American Community Bank chose ShoreTel.

“We wanted a system that was easy to manage, would reduce our long distance charges between branches and would provide simplified management,” said Ellis. “ShoreTel’s VoIP solution met those requirements. We

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visited one of their customers and they were ecstatic about the product, singing praises about the management, stability and how easy it was to roll out. We are a high growth bank, and the easy and cost-effective expansion capabilities of ShoreTel are very attractive.”

## **UNIFIED SYSTEM INCREASES PRODUCTIVITY, MAXIMIZES BUDGET**

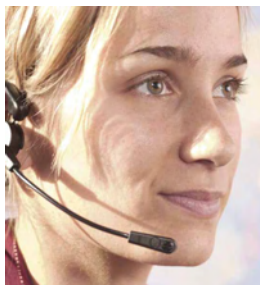
ShoreTel phone systems are easy to use, simple to manage, flexible, and reliable. With the ShoreTel system in place, all American Community Bank employees are now on the same phone and voice mail system, using 4-digit dialing to reach employees at any branch and even dialing co-workers by name. The least-call routing capabilities allow the bank to minimize costs by avoiding toll charges. For instance, if an employee in the main office in Monroe calls a customer in Gaffney, the call is routed through the bank’s data lines, through the Gaffney branch, and out to the customer, thus bypassing toll charges.

The ShoreTel Call Manager software improves day-to-day productivity for the bank by enhancing internal and external communications. This convergence of PC and phone allows employees to work more efficiently with one another and do a superior job satisfying customer needs and winning new business. With Call Manager, employees can quickly browse contacts and make calls from local directories or from Microsoft Outlook. In addition, the graphical interface provides easy access to sophisticated features, such as “on-the-fly” conferencing. ShoreTel’s Call Manager can even tell an employee if the person they intend to call or transfer an incoming call to is already on the phone before they dial, saving time invested in making calls.

“When we get a call using ShoreTel, we know exactly who is calling, where the call has come from – whether outside or from within the company – and how many times they have been transferred,” said Ellis. “This is a huge benefit since it is crucial that we maintain our excellent customer service reputation. And with Call Manager, we can integrate Microsoft Outlook and make calls quickly and easily. It’s very slick.”

The bank has a receptionist in the main office who functions like an operator, receiving calls and transferring within the branch and out to other branches. “There are also five incoming lines in each branch, and if those are full, the next call automatically rolls over to the receptionist in the main office,” said Ellis. “Once the call gets there, the receptionist sees on the screen where the call comes from, a list of people who have received calls into that branch, and also who is currently on the phone. This helps us eliminate the chance that a customer ends up talking to voice mail. Our mission is for calls to be answered by people—not voice mail. ShoreTel helps us achieve that.”

In addition, with ShoreTel, American Community Bank has further improved customer service by taking advantage of the advanced call handling features of the system. ACB can designate how incoming calls are routed, distributing customer service among branches to maximize utilization of their managers’ experience and expertise. The real-time reporting, historical reports, and call visibility provide ACB with the information needed to take care of the customer quickly and efficiently.



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## ROBUST FEATURE SET EMPOWERS USERS

The ShoreTel system provides integrated messaging, such as unified messaging, directory dialing, contact screen pop, and calendar integration. Bank employees can play voice mail messages on their PC, attach them to email messages or embed them in other documents.

ShoreTel’s powerful Follow Me Find Me feature allows employees to configure the system so that callers can find them—for instance, on their cell phone or home phone. If the person does not answer any of their phones, the call reverts back to the ShoreTel voice mail system.

“The ShoreTel system is the best phone system I have ever seen from a feature standpoint,” said Ellis. “Call manager helps me see what’s coming in, we can conference call with six people, and our calls find us. It doesn’t get much easier than this.”

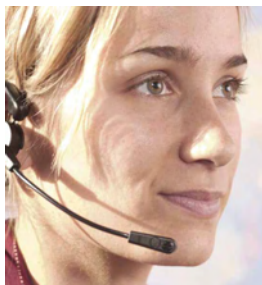
The bank has also integrated its telephone banking system into the ShoreTel solution. “Our telephone banking systems used to be three stand-alone lines, but now that we’ve brought it into the ShoreTel system, we have 16 lines available, which means customers looking to make transactions via telephone banking no longer get a busy signal,” said Ellis. “It is all about keeping our customers happy and expediting their calls quickly and efficiently.”

The ShoreTel system manages the bank’s bandwidth usage so that if data bandwidth is full, voice traffic will jump to a telephone line, so every call gets through. “We don’t have problems with call capacity, and the voice quality is great,” said Ellis.

## SIMPLIFIED MANAGEMENT LOWERS TOTAL COST OF OWNERSHIP

ShoreTel’s ShoreWare Director is a browser-based network management tool that provides a single management interface for all voice applications across all locations. For instance, when American Community Bank adds a new user onto the ShoreTel system, the user gets an extension, mailbox, and auto-attendant profile, and they can be added to any established workgroup—such as customer service—and location. Management of the system is handled from a single management platform and is accessible from any location with Internet access. This means that any change, such as the addition of a new user or an employee moving between branches, can be managed from any location on the network or even remotely from anywhere in the world.

Cost savings are also significant for American Community Bank since moving from the old system. “With our old system, whenever we added a new branch to the network, it cost us about \$12,000 for a branch system deployment,” said Ellis. “We had to outsource the installation, which sometimes took a few days if the administrator was busy, and the labor was costly. With the ShoreTel system, we can set it all up easily by in-house staff in less than a day, and a branch can be rolled out for \$5,000 or \$6,000. That’s a significant savings.”



*The ShoreWare Director  
is a wonderful  
time-saver. You can  
add a person in 30  
seconds, depending  
on how fast you type.*

Savings are realized also in the form of accurate reporting and planning, and with ShoreTel, the bank can do any kind of reporting necessary to stay ahead of their needs. “We can report on incoming calls for each extension or a particular extension, how many calls a particular number or branch is receiving, and so on,” said Ellis. “This information is very valuable for planning purposes. For example, we had a branch with particularly high-volume call traffic, and ShoreTel’s reporting told us that we needed to make some adjustments in order to improve the call capacity for that branch. Once we knew this, we simply adjusted our lines to accommodate. We were able to proactively make the necessary change before problems occurred.”

## **COLLABORATIVE EFFORTS BENEFIT AMERICAN COMMUNITY BANK**

American Community Bank worked with ShoreTel’s channel partner, CNP Technologies, based in Charlotte, North Carolina, to deploy the new phone system. CNP also provides network support and related services to American Community Bank.

“When we started working with CNP, things got a lot easier,” said Ellis. “CNP is more proactive than reactive. They produced a schematic of our network and continually help us to be more consistent and stable. They know the ShoreTel system really well.”

With ShoreTel and CNP as its technology providers, American Community Bank is looking forward to easily and seamlessly bringing on additional branches. “With excellent products from ShoreTel and the experience and knowledge of CNP, we have the best of everything and nothing is out of reach,” said Ellis.