

# ShoreTel and CB&S Bank



## CB&S Bank Replaces Patchwork of PBX Systems with Comprehensive IP Unified Communications System from ShoreTel



### CHALLENGE

- 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, ease of use and management.

### SOLUTION

- ShoreTel provided the bank with ShoreGear voice switches throughout its 40 offices, as well as over 522 ShorePhone IP telephones.

### BENEFITS

- CB&S Bank saves time and money by bringing management of the telephone system in-house.
- Call center capabilities enhance customer service—callers are always greeted by a person, rather than sent to voicemail.
- The ShoreTel IP Unified Communications system scales easily, which means CB&S Bank can keep up with its continuous growth without having to rely on a service provider.
- Least-cost routing capabilities save the bank in toll charges.
- Employee productivity is enhanced because of ShoreTel's rich feature set.



Founded a century ago in 1906, CB&S Bank, then called Citizens Bank, was the only bank in Russellville, Alabama to remain solvent throughout the Great Depression. With 40 locations in Alabama, Mississippi and Tennessee, over three hundred employees, and approximately \$1.5 billion in assets, CB&S Bank has become one of the largest community banks in the state of Alabama.

### CB&S Bank Researches Options

In early 2005, CB&S Bank had a patchwork of incompatible PBX phone systems throughout its offices. These disparate systems did not work well together and the overall solution was difficult to scale. In addition to needing 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 centralized call center capabilities.

"At the time, it was just too much of a challenge to try and get all of the older systems to work together," said 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."

### The Decision

CB&S Bank looked at IP telephony solutions from 3Com, Cisco and ShoreTel®. Scott and his team viewed demonstrations, called customer references, and actually worked with some of the systems. With priority on call center capabilities, ease of use and management, fail-over capabilities and feature richness, CB&S Bank chose the ShoreTel IP Unified Communications (UC) system.

"Not only was the ShoreTel system more cost-effective than the rest, it offered us the ease of use and intuitiveness that we were hoping to find," said 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."

With the help of its integration partner, Tampa-based DataComm Networks, Inc., ShoreTel provided CB&S Bank with 23 ShoreGear® 60, ten ShoreGear 40, four ShoreGear 120, and three ShoreGear T1 voice switches. The bank has also deployed over 522 ShorePhone™ IP telephones throughout its branch offices, including 210, 230, 530 and 560 models.



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### **Improved Collaboration**

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, and integrated recording capabilities allow users to record both audio and visual presentations for future use and historical record. 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,” said 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**

ShoreTel’s call control software is distributed to every voice switch, which eliminates any single point of failure. In the highly unlikely event a ShoreGear voice switch fails, the other switches on the network automatically take on the call-processing load. 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 ShoreWare® Personal Call Manager, 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 e-mail boxes. The bottom line is that no customer issue or message will ever get lost in the system. Finally, with ShoreWare Operator Call Manager, the bank’s receptionists and operators have access to online directories that help them quickly connect callers with the right person and also enhance their collaboration with key staff.

### **Savings**

ShoreWare 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. When a new user is added, Scott or a colleague simply clicks “add new” and enters the user’s name; this, in turn, automatically updates the centralized database and voice switches, creates a new mailbox, and updates the automated attendant dial-by-name and number feature and online directories—all in a matter of seconds.

With ShoreWare 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,” said Scott. “I really appreciate ShoreTel flexibility—when we need to make a change, it’s quick and simple. People move all the time, and 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.”

ShoreTel’s least-cost routing capabilities also allow the bank to minimize costs by avoiding toll charges. For instance, if an employee at the Russellville, Alabama headquarters location calls a customer in Falkner, Mississippi, the call is routed through the company’s data lines, through the Falkner branch, and out to the customer, bypassing toll charges.

### **Productivity Gains**

The ShoreTel UC system, which is integrated tightly with Microsoft Outlook®, provides integrated messaging, such as directory dialing, contact screen pop, and calendar integration. With the ShoreTel system, bank employees spend less time navigating complex telephone systems and more time performing critical tasks. The friendly, graphical interface of Personal Call Manager provides easy access to sophisticated features, including on-the-fly conferencing and document sharing.



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CB&S Bank receptionists enjoy an even higher level of functionality with ShoreWare Operator Call Manager, 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. With this unprecedented level of information, operators not only connect callers faster than ever, but also give them the highest level of professional service. Also, dynamic online directories eliminate paper directories – which are usually out of date anyway and not usually available online. With the complete company at their fingertips, along with knowledge about who is available and where a caller has already been sent, the receptionist can transfer using a simple drag-and-drop tool, to the most appropriate person—to their extension, cell phone or even their home phone.

### ***Call Center Enhances 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. An operator at one branch can be covered by people in the call center or at other sites. 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,” said Scott. “With it, we can have every phone ring in the call center so calls are answered—by a person, not voicemail—as quickly as possible. The call center not only helps us ensure calls are

answered by a live person—the centralization also helps us ensure callers are all getting one common answer to their questions. 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.”

### ***Ready for Growth***

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,” said Scott. “We are glad we went with ShoreTel and look forward to enjoying and benefiting from its technology for years to come.”