

ShoreTel and Union Bank



Union Bank Keeps Customers Happy by Ensuring Calls are Answered by Bank Employees, Not Voicemail



CHALLENGE

- In 2004, Union Bank surveyed its customers and found out that their biggest issue was the inability to reach a live person when calling the bank. This led the organization to seek a new telephone system that would eliminate that complaint and improve overall internal and external communications.

SOLUTION

- The ShoreTel IP Unified Communications (UC) system, including voice switches, voicemail server, and more than 200 ShorePhone IP telephones, was provided for the bank's 11 branch offices.

BENEFITS

- Union Bank customers now compliment Union Bank all the time because they are always able to reach a live person during regular banking hours.
- Employee productivity and internal communications are improved due to the robust features available to users.
- With the distributed nature of the ShoreTel UC system, Union Bank has a backup system in place in case any of its branches are hit by a natural disaster—calls are routed to another location for guaranteed customer responsiveness.
- Management is simplified so that moves, adds and changes are quickly and easily handled in-house.

The ShoreTel IP Unified Communications System Improves Customer Service, Enhances Productivity, and Eases Management Tasks and Costs

Kansas City, Missouri-based Union Bank had its beginning in 1965 as Bannister Bank & Trust, and three of the bank's founders remain on the Board of Directors today. The collective vision of the bank's founders for a community bank built on customer service (not a popular philosophy at the time) was the cornerstone of Union Bank and continues to be an integral part of its culture. Today, there are 11 Union Bank branches throughout the Kansas City metropolitan area.

Customer-Driven

In 2004, Union Bank conducted a customer survey, which included questions about the bank's locations, services, and communications, including the phone system. An overwhelming response from customers was that they wanted more of their calls answered by a person, rather than voicemail. The biggest complaints noted in the survey were that customers wanted to talk to real people, they did not like being bounced from one person to the next, and they did not like auto attendants where

they had to push a succession of buttons on their telephone in hopes of reaching someone who could help them.

"We looked very closely at all of the responses we got and realized that an overwhelming number of the preferences by customers were for more personalized customer service," said Lisa Dawson, Executive Vice President with Union Bank. "Our bank was built on excellent customer service and we still strive to fulfill that mission. We took these responses to heart and immediately began to search for a better telephone system."

Union Bank contacted several telephony vendors and saw some demonstrations by the vendors and their resellers. At the end, it came down to Cisco and ShoreTel® on the bank's short list. The bank placed priority on ease of management, business continuity (backup and recovery/redundancy), and features that would enhance customer service. After learning more about each system and speaking with customer references for both vendors, Union Bank chose the ShoreTel IP Unified Communications system to replace its outdated Southwestern Bell PBX-based system.



“With ShoreTel in place, our customers are always complimenting us on our customer service.”

– Lisa Dawson,

*Executive Vice President,
Union Bank*

“Every customer reference that we talked to regarding ShoreTel gave us excellent feedback,” said Dawson. “ShoreTel had a great design for back-up and redundancy to ensure system reliability, which is important in the banking industry. We cannot have any of our locations’ telephones go down. ShoreTel is also easier to use and manage.”

Investing in the Future

ShoreTel, with the help of its reseller, Teledata Communications, provided Union Bank with seven ShoreGear®120, eight ShoreGear 40, and two ShoreGear T1 voice switches, as well as a voicemail server. There are more than 200 ShorePhone™ IP telephones across all 11 branches, and ShoreWare® Director is used to manage the entire system. Deployed in February 2005 in phases across all 11 branches, Union Bank trained users on the system ahead of time so when it came to going live, it was just a matter of flipping the switch and it worked perfectly right away.

Customers Much Happier

The bank has established a workgroup for retail banking customer service, one for loan operations, and a third for the IT department’s help desk. The ShoreTel Workgroups capability enables the bank to consolidate all of these specific types of inquiry calls to one number, and the calls are routed to the next available call center staff member, regardless of where that staff member is located. Productivity is enhanced, and customers are treated more consistently. Workgroups also provide basic reporting capabilities to help the bank measure call volume and make work schedule changes as necessary.

“ShoreTel Workgroups allow our call centers to be run from different locations so we can tap expertise from anywhere,” said Dawson. “Staff members can log into the call center during busy times and help take customer service calls. Each workgroup can be set up however each supervisor wants it to be set up and supervisors can monitor calls. It’s also very flexible so we can have individuals log in and out of any workgroup as necessary. All of this contributes to our ability to provide excellent customer service.”

Customers appreciate that they can speak with a person during bank hours, or leave a message if the bank is closed. “With ShoreTel in place, our customers are always complimenting us on our customer service, commenting that they are happy to reach a live human being,” said Dawson. “Only if the bank is closed are they routed to the auto attendant and even then they can dial an extension and leave a message on someone’s voicemail using a self-service directory to find the right extension and expect a call back the following day. Customers now know that if a call is not answered, it means the bank is closed.”

Union 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, receptionists not only connect callers faster than ever, but also give them the highest level of professional service. In addition, dynamic, online directories eliminate paper directories – which are usually out of date anyway and not always available online. With the complete organization at their fingertips, along with knowledge about who is available and where a caller has already been sent, the receptionist can transfer the call, using a simple drag-and-drop tool, to the most appropriate person—to their extension, cell phone or even their home phone.

“Our receptionists like the phone system much better than the old one, especially the ability to see the status of the person being called,” said Dawson. “They’re able to provide better customer service and they are able to forward voicemails if necessary.”

Employees More Productive

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



calendar integration. ShoreWare Personal Call Manager allows users to quickly type in a name, which automatically brings up the contact's number, and make calls from local online directories—all with the click of a mouse, right from the desktop. With e-mail integration, e-mail and voicemail can be managed centrally right from employees' desktops, and voicemail messages can even be attached to e-mail messages for forwarding. The ability to track customer phone calls and export and distribute voicemails as WAV files helps the bank continually track and improve customer service. Employees also appreciate the superior voice quality of their ShorePhone IP telephones and having speakerphones on their own desks.

"Communication is much easier now with the ShoreTel unified messaging and call handling features," said Jeffrey J. Jernigan, President and CEO of Union Bank. "Customers and employees can find the right person in each branch quickly and simply—and adding new users and locations takes less than a minute. We just opened a new branch a few months after the system was installed—and adding that branch into the system was painless."

"The ShoreTel IP Unified Communications system has improved the overall efficiency of communications within the bank," said Dawson. "Employees like that they can see their missed calls, and supervisors appreciate the statistics, like the average number of calls or how many agents are on the phone. I manage the loan operations call center, and the old phone system required that two people be logged in at all times and they couldn't leave their desk. With ShoreTel, everyone is signed in all day long and calls are automatically routed to the person who hasn't had calls for the longest period of time. We have a much more efficient call center and productivity is enhanced tremendously."

Savings

ShoreWare Director, the ShoreTel system's browser-based 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, an IT staff member 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 bank had to rely heavily on its service provider, which took a lot of time and money. With ShoreTel, Union Bank employees can easily move to other desks and log in from the new location. The move is seamless and the employee does not need to update contacts with a new extension number—their number remains the same.

Reliability Improved

The ShoreTel 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. Union Bank has deployed additional ShoreTel servers to provide even further redundancy, which is imperative for its business.

"If one server goes down, we can easily switch to another with virtually no down time," said Dawson. "This is far superior to our previous experience with land lines—when a switch went down, it could take weeks to get new equipment. I believe many banks are converting to VoIP because of the ease of use, cost savings, and redundancy. VoIP allows us to easily re-assign users to a different branch if

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needed. If we faced a natural disaster, which thankfully we haven't, it would be easy to deploy employees to an unaffected branch."

Strong Partnership for the Future

With ShoreTel, Union Bank is looking forward to easily bringing on additional branches in the future when the opportunities arise. "ShoreTel allows us to be more flexible and much more responsive to our customers in the way they want to be treated, and we have disaster recovery systems in place," said Dawson.

"We're more than satisfied with our ShoreTel IP Unified Communications system and look forward to working with the company for our future IP telephony needs."

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