

# ShoreTel & JT Packard



## JT Packard Sees Productivity and Reliability Surge with ShoreTel IP Unified Communications System



### CHALLENGE

- Faced with an outdated PBX-based system, JT Packard decided to deploy an IP Unified Communications system that would reduce overall costs and provide added features, such as 4-digit dialing and conference calling, among others.

### SOLUTION

- ShoreTel provided the power supply provider with ShoreGear voice switches and ShorePhone IP telephones, as well as ShoreWare Director for end-to-end management.

### BENEFITS

- ShoreTel IP Unified Communications system is easy to manage, easy to scale, and easy to use for employees, lowering the overall total cost of ownership.
- Home, mobile workers and contractors work more closely together and distributed offices present a unified front to the outside world.
- Conference calling costs of \$3,000 to \$4,000 per month are eliminated with 24-port ShoreGear Conference Bridge.
- ShoreTel's workgroup capabilities allow call centers to enhance customer service.
- JT Packard saves time and money by bringing management of the telephone system in-house.



### Power Equipment Provider Deploys ShoreTel IP Unified Communications System and Streamlines Operations, Realizes Savings, and Enhances Productivity

JT Packard is the nation's largest independent service provider of network-critical power equipment. The company's foothold on the industry began with uninterruptable power supply (UPS) equipment sales. After recognizing the lack of a streamlined UPS service model, the organization expanded to fill the need for its customers, and as its service delivery matured, JT Packard naturally increased coverage to encompass the entire critical power supply: UPS, batteries, DC plants, generators, and HVAC equipment. The company, headquartered in Verona, Wisconsin, has more than 150 field offices across the country to maintain its service agreements in all 50 states. Prestigious property management firms and Fortune 500 companies alike trust JT Packard to ensure the constant flow of power to their mission-critical operations. In fact, more than 25% of Fortune 500 companies depend on JT Packard.

### Looking to Switch

In early 2007, JT Packard had an NEC PBX-based telephone system that was quickly

becoming outdated and lacking in features. Parts were no longer being supported and the system itself was reaching end-of-life. The company decided it was time to look into an entirely new system. According to Kevin Mengelt, CIO for JT Packard, "We wanted to reduce overall phone system costs—both operational and usage costs. We also wanted new features—we wanted to eventually integrate a new system with Salesforce.com, and we wanted the ability to see direct dial numbers, conduct conference calls on our own, and display caller information on the computer screen. We weren't able to do any of these things before."

Mengelt assigned a team to start doing research, arming them with a list of features JT Packard required, so that a list of viable contenders could be established. The team came up with a list of both PBX and IP telephony vendors. To these qualified vendors, including Avaya, Cisco, Nortel, and ShoreTel®, JT Packard issued a Request for Proposal (RFP). Eventually, it came down to Cisco and ShoreTel.

Mengelt and his team considered cost, architecture, scalability, and ease of use closely when comparing ShoreTel to Cisco. They also considered support capabilities and expertise



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of both the vendors and their integration partners. Cisco dropped its price considerably and even met the ShoreTel price. However, the team knew in terms of ongoing costs, ShoreTel would be less expensive over time, and since the company was going to expand, it was obvious it would be beneficial to stick with a solution that was cost-effective without discounts.

### ***Powerful Showing***

“Upfront costs are not all that matter,” said Mengelt. “We did a total cost of ownership analysis and ShoreTel came out on top. We knew we’d save money over time with ShoreTel, which is what counts. The ShoreTel architecture was simpler than Cisco’s, so it was less costly to expand and grow the system. ShoreTel was easier to operate, which results in lower costs. It’s easier to set-up users, which lowers general support costs. And ShoreTel met our needs in terms of features. It was also more robust, resulting in fewer failures and outages and a more reliable system.”

ShoreTel’s integration partner had brought ShoreTel in for the evaluation process and therefore supplied the ShoreGear® voice switches and ShorePhone™ IP telephones at the time of the deployment, in May 2007. The partner provided JT Packard with 20 ShoreGear voice switches and more than 460 ShorePhone IP telephones distributed across 18 locations. In addition, JT Packard has 25 ShoreWare® SoftPhone licenses.

### ***Going Live***

ShoreTel IP Unified Communications systems are easy to use, flexible, and reliable. With the ShoreTel system in place, all JT Packard employees are on a centralized phone and voicemail system, using 4-digit dialing to reach employees at any location, even when they’re working from home. The ShoreTel IP Unified Communications system also gives each JT Packard employee a graphical interface on their computer, ShoreWare Personal Call Manager, which provides Microsoft Outlook® integration with employee computers for directory dialing, contact screen pops, and calendar integration. ShoreWare Personal Call Manager gives users the equivalent of a desktop PBX—a powerful, all-purpose tool for managing voice communications. With it, employees can quickly

type in a name, bring up a number, and make their calls from local online directories—all with the click of a mouse, right from the desktop.

### ***Robust Features Give Employees a Power Boost***

The ShoreTel system’s Office Anywhere feature allows JT Packard employees to choose the device they work from – for instance, a cell phone or home phone – and that device assumes the identity and capabilities of his or her regular office extension.

“Office Anywhere indicates JT Packard is calling, even if the call is being placed from a worker’s home office,” said Mengelt. “It obviously protects privacy and enhances security measures, which we instill. We also provide Personal Call Manager capabilities to staff cell phones because it’s so powerful. A call can go directly to a user on their cell phone, yet they can transfer using 4-digit dialing, and the person to whom they’re transferring knows where the call is coming from. It works just like it would work if the cell phone user were working from a desktop phone.”

JT Packard also utilizes ShoreWare Softphone for some of its users that work out of their homes. A flexible choice for mobile workers, Softphone also eliminates the need for an actual handset. SoftPhone extends the capabilities of a user’s desktop extension to any computer, even a laptop over a wireless network, so they can enjoy transparent access to enterprise telephony features while on the road or working from home.

“Even working from home or a hotel, employees can access all the features of Personal Call Manager, and those of us in the office can see their presence on the network, so it’s just like they’re working at another desk in one of the locations,” said Mengelt. “ShoreWare Softphone is the perfect solution for mobile users, and the company continues to benefit from all the cost savings and productivity enhancing benefits of the ShoreTel system.”

### ***Customer-Facing Tools Enhance Responsiveness***



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JT Packard 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 level of information, receptionists 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.

“For our receptionists to be able to see the status of each person being called allows them to handle important calls faster and easier, and it also ensures that callers are connected to the right person who can help them quickly,” said Mengelt. “The receptionists are also freed up to multitask, with all this information available at their fingertips.”

JT Packard is utilizing ShoreTel’s Converged Conferencing solution, a 24-port ShoreGear Conference Bridge, which allows employees to quickly and easily set-up conference calls on the fly, minimizing the time it takes to address customer or office-related issues. “Now we can initiate conference calls in minutes, and simply send out an invitation right beforehand,” said Mengelt. “We don’t have to rely on a costly outside service to do this for us. We were spending \$3,000 to \$4,000 per month on conference calling before ShoreTel. Now it’s covered with the ShoreGear Conference Bridge, and we use 16,000 caller-minutes a month for regional manager staff meetings and project coordination meetings. It saves us time and money, as well as the frustration of having to rely on an outside vendor who may not put us first on their list of customers to serve.” Finally, ShoreTel’s workgroup capabilities enable JT Packard to consolidate various inquiry calls to one number, and calls are routed to the next

available call center staff member. The company has five such call centers set up for departments including sales, customer support, parts, and information technology. Call center staffers can easily sign in and out of the workgroup, and agents have access to tools that measure current call volume so they can better manage their time.

The ability of the ShoreTel system to record calls easily is helpful in continually monitoring call center staff performance and the organization’s overall customer satisfaction. The company’s sales managers and call center supervisors use the feature for training purposes and to keep a record of calls from outside service contractors.

Workgroups also provides basic reporting so agents and supervisors can measure call volume more effectively and make scheduling changes as necessary, and supervisors can see what can be done to improve on call center operations. Finally, the single distributed voice network facilitates teamwork and enables virtual workgroups, and calls can be routed across sites anywhere on the network—not just within the same physical location. The ShoreTel IP Unified Communications system also allows JT Packard to page all employees at the same time, making announcements through the system to every user. For a company with many geographically distributed staff members and many contractors, features like this are very important, according to Mengelt.

“With the ShoreTel system, the distributed nature of the staff doesn’t get in the way of communications—nobody is treated like external staff—including small contractors that work with us,” said Mengelt. “Everybody is working more efficiently because of the ShoreTel system.”

The ShoreTel system also helps ensure calls into a specific workgroup will be answered by a live person, rather than being sent into voicemail after a certain number of transfer attempts. With ShoreTel’s Escalation Notification, a call into the company’s support line will not go unanswered because the feature allows the transfer of a message until it has been actually picked up. This is an important feature for JT Packard, which has greatly improved round-the-clock service and support, since its customers need to always be able to reach a person in the case of



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an emergency or problem with their equipment.

“Escalation Notification ensures that calls into our after-hours tech support are picked up by the person on call or a backup representative, and the system will keep calling until it finds an available support representative,” said Mengelt. “That’s a crucial element of our business—around-the-clock availability.”

### *Disaster Recovery and Reliability*

A key feature of the ShoreTel IP Unified Communications system is its distributed architecture design, which makes it ideal for multi-site organizations that span multiple locations and is also more reliable than server-centric solutions. In addition, 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. With the distributed nature of the ShoreTel IP Unified Communications system, it is easy to reroute calls and continue business as usual.

### *Simplified Management Empowers IT to Do More*

JT Packard uses ShoreTel’s ShoreWare Director for system management, troubleshooting and planning. “The ShoreTel IP Unified Communications system is amazingly easy—it was amazingly easy to install and it’s easy to maintain,” said Mengelt. “You can maintain it from any browser from any location using ShoreWare Director. The simplicity of the ShoreTel system frees my staff up to handle other, more crucial projects.”

### *Poised for the Future*

JT Packard plans to integrate its ShoreTel system with Salesforce.com for even further

enhanced customer service and productivity. The company also has an SQL database with additional customer information that will be integrated with the ShoreTel system.

“The ShoreTel system offers us all the features we needed to make significant changes and improvements, yet it’s easy to use,” said Mengelt. “I like the fact that we can track inbound and outbound call history. We didn’t have inbound call tracking capabilities, nor were we able to see this information live in order to determine which calls were critical as they came in. Now we are able to route the most important calls to the right agents. That capability alone has made a tremendous difference in streamlining our operations. When you add to that the features that affect everyone’s productivity, like dialing by name and 4-digit dialing, you just can’t beat the improvements. Everybody around the country now feels like part of the team—there’s nobody who feels like an outsider because of the enhanced communications. The new ShoreTel IP Unified Communications system is a tremendous gain for both our employees and our customers.”