

DARBY BANK & TRUST LOWERS COSTS WITH SHORETEL VOIP

Banking on ShoreTel for Simplified Management, Lower Long-Distance Bills, and Enhanced Customer Service



Challenge:

Darby Bank & Trust had an outdated PBX that it was quickly outgrowing. During a time of steady growth for the bank, the system had already reached maximum capacity.

Solution:

Darby Bank decided to investigate VoIP solutions and chose ShoreTel, which provided the bank with an end-to-end system, including ShoreGear voice switches and ShorePhone IP telephones.

Benefits:

- The bank can now manage its own moves, adds, and changes, eliminating the need for costly service providers the bank once had to rely on for these administrative tasks.
- The bank saves \$2,500 to \$3,000 a month in long distance charges with ShoreTel's least-cost routing capabilities.
- Customer service is enhanced significantly with rich ShoreTel features, enabling operators to handle incoming calls quickly and efficiently.
- Productivity is boosted because employees are no longer wasting time looking up telephone numbers, and the chances of human error are decreased with ShoreTel's powerful reporting, logging, and desktop integration features.

Darby Bank & Trust Company, now in its 78th year of business, has been in operation since 1927 and is headquartered in Vidalia, Georgia. The bank serves Toombs County, Chatham County and surrounding areas with eight locations (including six branches, a mortgage office, and loan administration office) in Vidalia, Lyons, Pooler, and Savannah.

In the spring of 2004, Darby Bank was faced with an outdated Nortel PBX that it was quickly outgrowing. The system had reached maximum capacity at the very time the bank was continuing its rapid growth, steadily adding new branches. Shan Venable, Vice President/Technology Manager at the bank, was looking closely at Voice over IP (VoIP) to determine whether the technology was mature enough to deploy at the bank. He and his team spent eight months reviewing solutions from Avaya, Cisco, IP Centrex (a hosted solution), and ShoreTel.

“We knew we wanted to go to VoIP,” said Venable. “We just weren't sure if it was ready for us or if it we were ready for it. We had concerns regarding quality so we took things pretty slowly.”

Around that time, Venable attended a bank conference and while there, he saw leading VoIP solution provider ShoreTel. He had a chance see the company's solution in action and liked what he saw. When he returned home, he scheduled a meeting with Darby Bank's integration partner to discuss the ShoreTel solution and see another demo up close.

“Before we saw the ShoreTel demonstration at the conference, we had done a lot of research into each of the VoIP solutions,” said Venable. “We needed something that was easy to manage, met our budget, and offered us a lot of business-boosting features.”

After careful consideration, seeing demonstrations, and talking to customer references for each vendor, Darby Bank chose a system from ShoreTel. Venable cites ease of installation and administration, performance, cost of ownership, and the robust feature set as the top reasons for going with ShoreTel.

“With ShoreTel, you didn't need to overhaul the network, like with Cisco,” said Venable. “With ShoreTel, as long as our gear met with certain speed and quality requirements—which ours did—the system would work fine. We also appreciated the fact that with ShoreTel, as long as you have a little



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*Vice President/Technology Manager
Darby Bank & Trust*

bit of networking experience, managing it is easy. We don’t have engineers on staff available just to manage a phone system—with other systems, that’s what you’d need. And last but not least, ShoreTel blew away the rest when it came to features for both users and administrators.”

MAKING THE SWITCH

Darby implemented the new VoIP solution in a staggered fashion with more than 160 ShorePhone IP 530 telephones, three ShoreGear-120/24, three ShoreGear-40/8, one ShoreGear-60/12 and two ShoreGear-T1 voice switches. The ShoreGear-T1 switches are deployed in Vidalia (headquarters building) and another is at a Savannah branch. ShoreGear-T1 voice switches provide a T1 interface for high-density trunking to both Vidalia and Savannah, and the switches support Primary Rate Interface (PRI) signaling.

EASE OF MANAGEMENT

Darby Bank uses ShoreTel’s ShoreWare Director, a browser-based management interface that provides easy access to the system from anywhere on the network. Through ShoreWare Director, a network administrator can manage every site, including voice mail, automated attendant and desktop applications. To add a new user, Venable or a colleague simply clicks a button and enters the user’s name, and this automatically updates the centralized database and the other ShoreTel switches in the branches. At the time the new user is added, a mailbox is automatically created, the automated attendant dial-by-name and number feature is updated, and online directories are revised. The entire process takes just seconds.

“With ShoreTel, we don’t need to have someone else come in to handle moves, adds and changes,” said Venable. “We can handle that all in-house. Before, we’d have to put in a request, wait for someone to come out, and then pay a costly fee. Now I can do it myself in about 60 seconds.”

In addition to administration features, the robust feature set ShoreTel provides for users is also something Venable praises. “Even those employees who are averse to technology have ended up loving the system,” said Venable. “For instance, ShoreTel allows you to sign into any handset and make that your own extension—it’s called Extension Reassignment. When I showed that feature to one particularly technology-shy person at the bank, he came back and could not stop raving about how much he loved the feature. Everybody has learned it quickly and effortlessly and you’d never be able to pry the ShoreTel phones out of their hands now.”

ENHANCING BANKING CUSTOMER SERVICE

The ShoreTel system gives each user a graphical interface, Call Manager, on their PC which provides Outlook integration for directory dialing, contact screen pops, and calendar integration. ShoreWare Personal Call Manager gives Darby Bank employees the equivalent of a desktop PBX—a powerful, all-purpose tool for managing voice communications. With it, employees can

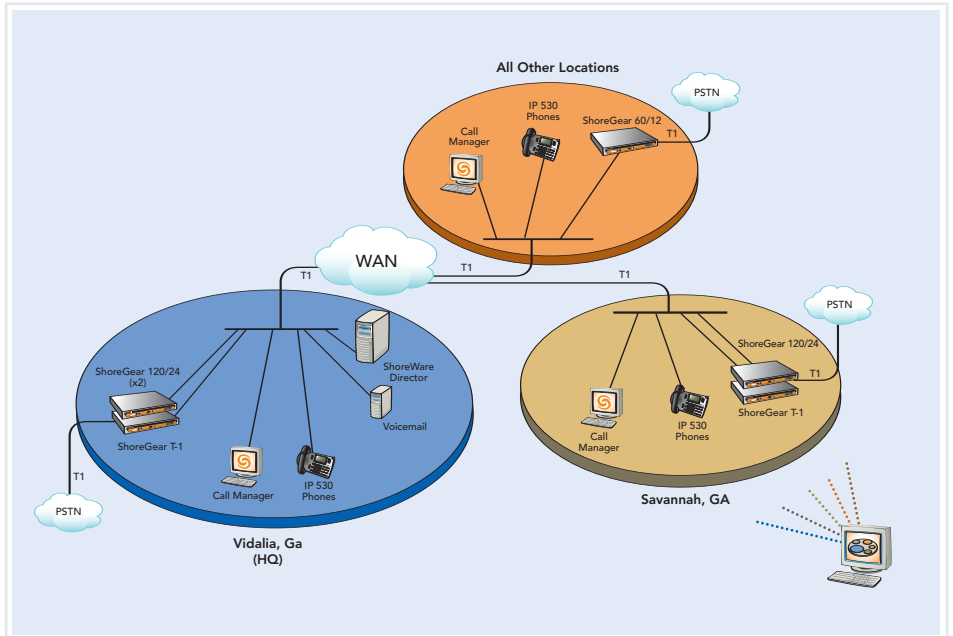


quickly type in a name, bring up a number, and make their calls from local online directories—all with the click of a mouse, right from the desktop.

With ShoreTel's e-mail integration, employees can also manage their e-mail and voice mail activity centrally and efficiently. Voice mail messages are stored in the industry-standard WAV Audio for Windows format, allowing users to play them on multimedia PCs, attach them to email messages or embed them in other documents. The ability of the ShoreTel system to track customer phone calls, export and distribute voice mails as WAV files, and keep a running history of calls into each number is helpful in continually monitoring and improving customer service.

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Darby Bank & Trust deployed ShoreTel to eight locations with 160 IP 530 telephones.

"ShoreTel Call Manager is great in a lot of ways, but one particular feature is the history recall," said Venable. "The system keeps a record for several weeks, so you don't have to worry about locating handwritten notes to find a telephone number. Calls in and out are logged so that if you need to call a customer back, you simply scroll through, find the person's name, and click on it to dial. It removes the chance of human error and simplifies life for employees."

In addition to the powerful Personal Call Manager, the ShoreTel Operator Call Manager software provides the bank's operators with key information and control, allowing them to provide a significantly higher level of personalized attention to callers. For example, before even answering an incoming call, a call-routing log displays the caller's experience within the system, and before transferring the caller any further, the call-transfer screen displays who is available and who is not, avoiding the possibility of sending the caller to a busy extension. With the complete company at their fingertips as well as knowledge about the calling and called party, operators can transfer to extensions, cell phones or even home phones instantly.



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“The operator is armed with so much useful information before even answering a call,” said Venable. “ShoreTel provides great visibility into what’s happening at each branch. The operator can see a caller’s history and see who is in and who is out so that each caller’s experience is positive. That’s a huge benefit. As a bank, of course, we’re customer-service oriented, and ShoreTel helps us assist callers as quickly and efficiently as possible.”

SHORETEL SYSTEM MAXIMIZES BUDGET

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

“We estimate a savings of about \$2,500 to \$3,000 a month with ShoreTel’s least-cost routing—at least \$30,000 a year,” said Venable. “The intangibles are great—all the powerful features, the ease of use, all those things. But the long-distance savings really puts the bottom-line benefits of ShoreTel into perspective.”

The ShoreTel system also made it possible for each employee at every Darby Bank location to have their own dedicated phone number. This eliminates approximately 60 percent of calls into the main number, thereby lightening the operator’s load, according to Venable. “Because a caller can dial my number directly, they don’t have to go through the receptionist anymore,” said Venable. “The operator is no longer just a traffic cop trying to handle calls as quickly as possible. Now he or she can work more efficiently and more closely with each caller to ensure the caller is getting the help they need. That’s a benefit to our customer service operations and it’s a benefit to the bottom line.”

EQUIPPED FOR THE FUTURE

Darby Bank & Trust has been pleased with the implementation experience and the features it’s been able to put into use within its organization. With plans to add a call center, Venable notes that once again, ShoreTel has it covered. “Another thing that set ShoreTel apart is the fact that Contact Center is bundled right into the system already—so we’re prepared for our call center right now,” said Venable. “The feature set available in the ShoreTel system far exceeds those of other solutions available on the market. We’re very happy with ShoreTel and look forward to working with them into the future.”