

RAPID CHANGE DRIVES HERITAGE PLAZA MORTGAGE TO VOIP

Flexible ShoreTel voice system is easy to manage, reconfigure, and expand



Challenge:

Heritage Plaza Mortgage was shifting into rapid growth gear and expanding its corporate offices from one headquarters facility to four locations spread across Northern California. The existing phone system was out of capacity, difficult to manage, and couldn't operate across multiple locations.

Solution:

A single ShoreTel IP telephony system was distributed across the four locations, with features that include automatic least-cost routing, workgroups, a built-in conference bridge with integrated document sharing, and a virtual contact center. All desktops were equipped with IP phones and the Personal Call Manager interface with unified messaging.

Benefits:

Using the ShoreTel system has reduced costs while its unified messaging and other convergence-enabled applications have boosted efficiency and productivity and improved customer service. The system requires very little management – it is easy to reconfigure or expand as business needs change – and a redundant architecture with automatic failover ensures high availability.

Change is the only constant in the volatile mortgage industry, and traditional phone systems simply can't accommodate it. Heritage Plaza Mortgage started the shopping process for something better last year and is now reaping the benefits of voice/data convergence, courtesy of a unique multi-site voice system from ShoreTel Inc.

The move was in keeping with the Stockton, Calif.-based residential mortgage lender's vow to, as executive vice president and CFO Gary Gremel puts it, "aggressively use technological opportunities to improve customer service levels."

By early 2004, the company's archaic NEC PBX had become a limiting factor for the company's growth plan. It was out of capacity, hard to use and manage, didn't offer automatic least-cost routing, and couldn't operate as a single system across multiple sites. Since Heritage Plaza Mortgage was beginning a major expansion of both workforce and branch locations, something had to be done. Gremel and his team started researching new phone systems and were encouraged by advances that IP telephony had made.

The flexible softswitch technology enables a single system to be distributed across multiple sites and change or expand easily to meet business needs. Trunk consolidation and least-cost routing reduce costs, and unified messaging and other convergence-enabled applications boost efficiency and productivity and improve customer service.

That's the theory, anyway. Heritage Plaza Mortgage quickly discovered a lot of differences in whether and how the various IP PBX vendors delivered on these promises, and narrowed down the field.

SEEING IS BELIEVING

"We were very impressed with Mitel's solution, but that was before the ShoreTel demonstration," says Gremel. The Heritage Plaza Mortgage team was particularly impressed with ShoreTel's award-winning Personal Call Manager application, which delivers advanced call control features to users in a highly intuitive interface.

Other key features and functions that made ShoreTel the obvious choice:

- The truly distributed architecture, supporting multiple locations with built-in redundancy and no single point of failure.
- The intelligence to do automatic least-cost routing and failover, without programming.
- Unified messaging and integration with Outlook directories and calendars.



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- Automated out-of-office call handling.
- Enhanced Call Manager versions for operators, agents, and supervisors.
- Built-in conference bridge and workgroups.
- Scalability that would support future growth in any direction.

“Our team worked closely with Heritage Plaza Mortgage to satisfy the design criteria and develop a seamless implementation plan,” says Mark O. Day, vice president of ShoreTel channel partner Communication Technology Services. “The result is a single network spanning multiple locations and facilitating customer access to Heritage Plaza Mortgage products. The ShoreTel system is also extremely reliable: There is no single point of failure, and it doesn’t rely on Windows for dial tone.”

When the ShoreTel implementation began in June of 2004, Heritage Plaza Mortgage was about to expand its Stockton headquarters into a second building across the street and open a new wholesale branch office in Sacramento. There were also plans for further expansion, and a fourth branch office was opened in Concord, Calif., in early 2005.

As the rollout started, Heritage Plaza Mortgage was still waiting for fiber link that now runs under the street and connects the two Stockton buildings. Meanwhile, the new Sacramento office was added to the ShoreTel network before its local phone company could provide trunks. Consequently, Sacramento’s outgoing calls had to be backhauled over the WAN to headquarters, and looked like they were originating in Stockton.

SINGLE SYSTEM ACROSS SITES

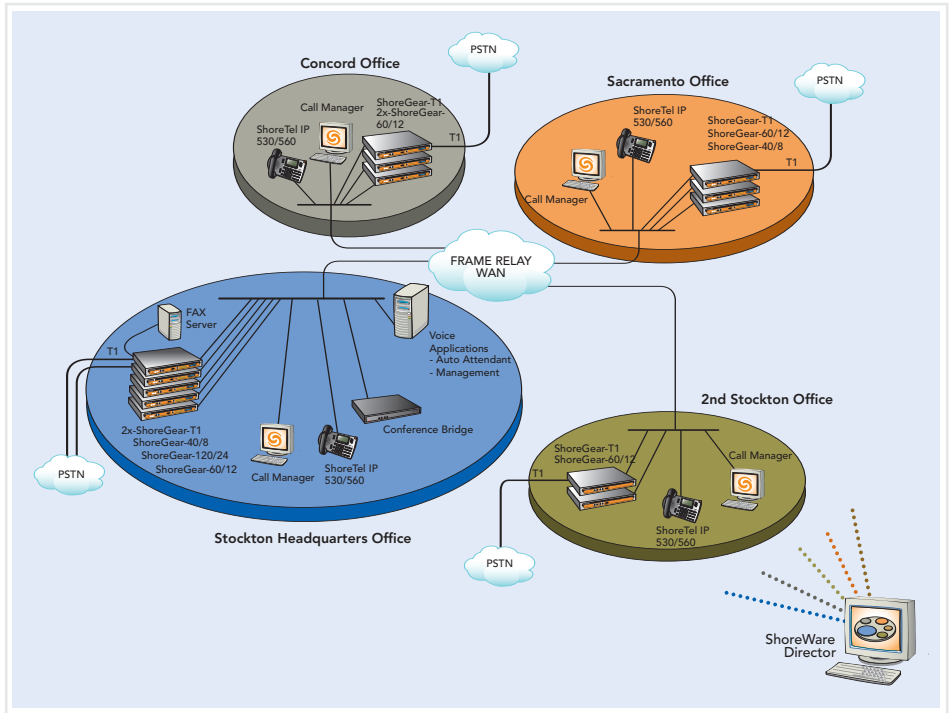
Today a single ShoreTel voice system spans three cities across Northern California, serving four offices and 100 employees. It consists of one ShoreGear-120/24 switch, two ShoreGear 60/12 switches, and two ShoreGear-40/8 switches, with ShoreGear-T1 switches providing the WAN interface.

“Processes that used to require two phone lines don’t anymore,” reports Gremel. “When a call comes in to Stockton and needs to go to someone in Concord, the operator doesn’t have to use a second phone line to call a different phone system in Concord. It’s all one system, and the calls are simply routed.”

If a network router fails, ShoreTel automatically looks for the next one. The system also allows for more flexible T1 configurations. In Heritage Plaza Mortgage’s old phone system, all the T1s plugged into the single PBX. If the PBX failed, so did the T1s. When a ShoreTel site has multiple T1s—and the Stockton location has two—each one can be plugged into separate ShoreGear switches.

“That gives us a redundant architecture,” Gremel reports. “We are receiving very good reports on the voice quality using IP phones. The whole system is very reliable. There have been very few problems or notes of bad connections.”

The ShoreTel system supports traditional analog and digital handsets, but Heritage Plaza Mortgage elected to put IP530 or IP560 IP phones on every desktop.



Heritage Plaza's telephony deployment across 4 sites with over 100 users.

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“The receptionists can now see all the extensions on their desktops, instead of having phones with lots of extensions that light up,” says Gremel. Drag-and-drop call administration from the Operator Call Manager screen makes their job a lot easier. Right now, callers who press zero to speak with an operator come to one of the corporate operators in Stockton, but Heritage Plaza Mortgage is considering eventually deploying virtual receptionists using ShoreTel to automatic load balance between Stockton, Sacramento, and Concord.

IMMEDIATE HIT WITH USERS

Users often resist new technology, especially when it is replacing a system as ingrained as a telephone. However, ShoreTel’s intuitive Personal Call Manager interface was an immediate hit with Heritage Plaza Mortgage employees. The PCM application basically puts a PBX on everyone’s desktop, and tight Outlook integration adds true unified messaging into the mix.

ShoreTel’s PCM took over the e-document integration, listing awaiting voice mail messages, Outlook e-mails, and RightFax faxes in the user’s inbox along with information about the caller or sender. Users can take in the entire list at a glance and prioritize responses.

Voice mail messages are stored in standard WAV files, and users can play them, attach them to e-mail messages, or embed them in other documents. The Outlook integration also enables point-and-click dialing from contact directories, contact screen pops, and the use of calendar information to determine call-handling options.

“People were eager to get the additional benefits the PCM offered, and it made the whole ShoreTel system very easy to use,” recalls Gremel. “We didn’t hear one negative remark about the ShoreTel migration.”



“ShoreTel gives us great flexibility and mobility, and we don’t have to tie up IT staff with making changes whenever someone needs to move around. The AnyPhone feature is a big savings.”

CONNECTING PEOPLE, NOT PHONES

The single distributed voice system with its presence-sensing capability and AnyPhone feature provides location independence to Heritage Plaza Mortgage employees. Phone numbers are attached to people, not phones, and calls automatically get routed to employees wherever they happen to be—such as a temporary office, hotel room, or home office.

Employees who get transferred to an office in a different city, or who have to work in on temporarily, can keep the same extension. For example, when Heritage Plaza Mortgage was getting ready to open the Sacramento office, the employees now located there began their jobs in Stockton, but used their permanent phone extensions from the outset.

“It doesn’t matter where the employees are now, because their phone number automatically follows them,” says Gremel. “Moves within the company are transparent. There is no need to publish our staff’s extensions or internal phone numbers, because within the company, we dial by name. It’s the outside world that uses the extensions, so it is important for the extensions to follow the employees wherever they go.”

Heritage Plaza Mortgage shifts underwriters from one location to another to fill in occasional gaps, the underwriters just log in at their temporary offices, and calls are automatically routed to them. With the old NEC system, calls had to be manually forwarded to the traveling underwriters’ cell phones. This process burned air time and required two PBX lines.

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GOING VIRTUAL

Employees can drop in on virtual meetings from anywhere, courtesy of ShoreTel’s integrated conference bridge with document sharing. Heritage Plaza Mortgage also implemented ShoreTel’s Contact Center, which supports virtual configurations. All the toll-free lines are consolidated in the data center, and the agents answering them can be based elsewhere.

Extension monitoring and call logs make Heritage Plaza’s call centers highly accountable. Managers can monitor and even break into calls, which helps with agent training and ongoing quality control. Agent performance can also be checked after the fact, by querying ShoreTel’s complete call history database.

Records show which agents contacted which customers or prospects, and reveal who is using the phone system and how. Such complete information also helps with capacity planning and budgeting, and means that allocation of phone resources to individual departments can be usage-based.

Initially, Heritage Plaza Mortgage is implementing ShoreTel’s workgroup features at the most basic level, using simple sequential routing to send calls to the next available agent.

“This is our initial roll out” says Gremel. “As we grow, we can make the environment more dynamic and efficient with features such as skills-based routing and varying call flow based on time of day or day of week.”



“Now, even during class, we can send a call to someone’s voice mail, so we aren’t physically taking a message and trying to get it to them. That saves us a lot of time.”

Heritage Plaza Mortgage likes the way the ShoreTel system can be deployed very quickly. “The auto attendant and workgroups are very dynamic. This provides a simple roll out knowing additional customization can be made quickly as feedback is received from the production environment” Gremel explains.

FLEXIBLE YET MANAGEABLE

This flexibility lets Heritage Plaza Mortgage meet the specific needs of different groups within the company. Managers simply provide a schematic of how their departments’ calls are to be answered, and the IT staff can accommodate them. In contrast, any changes to the old system, such as a new greeting, impacted everyone. Now, greetings, call flows, and other settings can be customized for each department.

“It’s an open architecture,” Gremel says. “This technology flows from one point to another; you are able to manage the process while being transparent to the users and callers.”

Flexibility often comes at the expense of simplicity, but Gremel reports that the ShoreTel system requires very little management. To make a change to the old NEC system, an administrator had to program it over into the PBX using key commands. If the change was outside the repertoire of the Heritage Plaza Mortgage staff, a third-party support service charged \$235 to drive out to Heritage Plaza Mortgage to program the changes.

A two-day wait was typical, and the \$235 didn’t seem to buy much skill or professionalism. “When you spend a quarter of a million of dollars on a phone system, you expect decent service. We thought maybe we’d eventually reach the point where we’d spent enough to qualify for better treatment, but it never happened.”

With ShoreTel, Gremel’s staff doesn’t have to wait two days or walk to a switch. Most changes can be made in minutes from any web connection.

The manageability and scalability are critical, because Heritage Plaza Mortgage has grown dramatically since the new voice system was purchased. Office space has increased 50% and the workforce has grown by two thirds. The ShoreTel system stabilized phone costs during this rapid growth, enabling Heritage Plaza Mortgage to monitor phone bills and spot potential cost issues and take corrective action.

“We haven’t completed our ROI study, however I know we are saving money, because I know what the system is doing,” Gremel asserts. “There are so many more things we can do with it.” He says Heritage Plaza Mortgage is still just scratching the surface of the ShoreTel IP telephony system’s capabilities. The technology has multiple levels, and its depths can be implemented gradually as business requirements dictate.

“In general, ShoreTel is very robust, very redundant, and very flexible, while also being extremely easy to use and manage – everyone is delighted with the system,” sums up Gremel. “I have no doubts about the system’s ability to meet our needs today and as we continue to grow.”