



Industry: Financial

Installation: 12 locations, 16 ShoreGear voice switches, 300+ ShorePhone IP phones

Date of Install: March 2004 to February 2006



Challenge:

Community Bank & Trust, which was growing rapidly, had different telephone systems in each branch. The bank was unable to centralize communications and there was no consistency across the organization.

Solution:

ShoreTel provided the bank with an entire VoIP system for all of its 12 locations, including ShoreGear voice switches and ShorePhone IP telephones.

Benefits:

- With ShoreTel, management is simplified so it can be handled in-house, eliminating the time and cost associated with relying on an outside service provider.
- Rich features enhance employee productivity and customer service—with features like Workgroups, Hunt groups, and Find Me Follow Me, a live person is always within reach of every caller who needs one.
- Community Bank & Trust can bring on a new branch in just about one day with ShoreTel.

BANKING ON SHORETEL VOIP

Community Bank & Trust Replaces Disparate Phone Systems with ShoreTel for Easy Management, Scalability and Better Customer Service

Community Bank & Trust is a growing bank with strong community roots and a mission to meet or exceed customer expectations. Founded in 1989 by fourteen local Sheboygan investors who felt a need for a locally owned and operated independent bank, the bank has grown to over \$500 million in assets, eleven branch offices, and more than 250 employees. Community Bank & Trust has been the leading lender in its size category since 1999, has been recognized as Wisconsin's Minority Lender of the Year for two successive years, and earned the 2004 and 2005 Customer First Award from Lakeland College and the Sheboygan Press.

DECIDING TO SWITCH

In early 2004, Community Bank & Trust was growing rapidly—both adding new locations and growing established branches. With different telephone systems in each branch, including systems from 3Com, AT&T, Avaya and Lucent, the organization was not able to centralize communications and everybody had different features. There was no consistency and the way things were, adding new offices was very difficult.

“We were unable to move employees from one workstation to another without having an outside vendor come in to re-wire,” said Sheila Genske, IT Trainer and Telecommunications Specialist with Community Bank & Trust. “We needed a new system that would allow us to make those changes ourselves and also enable us to easily transfer calls between branches. At the time, if a caller dialing one branch needed someone at another branch, they had to hang up and dial the other number. That’s just not good customer service.”

The bank spoke with their phone company and various local integrators to find out what types of solutions were available. Eventually, the bank had a list of four vendors under consideration: 3Com, NEC, Nortel and ShoreTel. The Germantown, Wisconsin-based integrator brought ShoreTel in for consideration because it was using a Voice over IP (VoIP) solution from ShoreTel throughout its own offices.

The bank prioritized its requirements and decided that it would make its choice based on solution cost-effectiveness, ease of use and management, and reporting functionality. 3Com and Nortel were too expensive right from the start, and the NEC system was too new to consider seriously. The local integrator recommended that the bank speak with some ShoreTel customers to hear about their experience and see a ShoreTel demo. These steps sealed the deal and Community Bank & Trust chose ShoreTel.



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ShoreTel provided Community Bank & Trust with 10 of its ShoreGear-120/24 voice switches, two ShoreGear-T1 switches for its corporate office and a branch, one ShoreGear-60/12 voice switch, and three ShoreGear-40/8 voice switches. In addition, the bank has deployed over 300 ShorePhone IP phones, including 100 and 530/560 models.

MANAGEMENT COST 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 voice mail, automated attendant and desktop applications. When a new user is added, Genske 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 they can all be handled in-house.

“We are constantly shifting personnel around, and the old phone systems made this very difficult,” says Genske. “An outside vendor would have to come in, and the whole process could take days depending on their availability. The ShoreTel system is browser-based, and I can make changes immediately, even from home. The ShoreWare Director management interface is very intuitive-it is an awesome tool to have.”

PRODUCTIVITY GAINS

ShoreTel phone systems are easy to use, simple to manage, flexible, and reliable. With the ShoreTel system in place, all of the bank’s employees are now on the same phone and voice mail system, using 4-digit dialing to reach employees at any branch and even dialing co-workers by name. ShoreTel’s least-call routing capabilities allow Community Bank & Trust to minimize costs by avoiding toll charges. For instance, if an employee at the Sheboygan location calls a customer in Glendale, Wisconsin, the call is routed through the company’s data lines, through the Glendale branch, and out to the customer, bypassing toll charges. According to Genske, this feature has significantly cut the bank’s long distance charges.

The ShoreTel system provides integrated messaging, such as directory dialing, contact screen pop, and calendar integration. With the ShoreTel solution, 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.

ShoreTel’s powerful Follow Me Find Me feature allows employees to configure the system so that callers can find them—for instance, on their cell phone or



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home phone. Community Bank & Trust uses this feature for its after-hours and weekend service, so that people calling in with a problem in the off-hours can reach a live person if needed.

Community Bank & Trust receptionists enjoy an even higher level of functionality with ShoreTel's 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.

“With Operator Call Manager, it's easier to locate users that move around a lot,” said Genske. “So you're not just blindly transferring to people – you can see if they are there or if they're already on the phone, and proceed accordingly. In addition, ShoreTel just makes it easy for a caller to quickly locate the person they need. All of these things have really enhanced customer service.”

SHORETEL ENHANCES THE CUSTOMER EXPERIENCE

ShoreTel's Workgroups enables Community Bank & Trust to consolidate its inquiry calls to one number per workgroup, and calls are routed to the next available staff member. For instance, the bank has various workgroups for customer service, loan operations, marketing and more. At each branch, operators are also in a separate workgroup. This means that various telephones throughout the organization ring at once, and whoever is available answers the call, minimizing the possibility of a caller being sent to voice mail, which is frustrating. Workgroups also provides reporting capabilities to help the bank measure call volume and make work schedule changes as necessary.

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Community Bank & Trust also utilizes ShoreTel's hunt groups capability, which allows multiple call routing options to ensure that live calls are answered by having primary and backup operators in the same—or a different—location. With hunt groups, when a person is on the phone or unavailable, calls are routed to another extension, preventing customers from unnecessarily reaching voice mail. Calls can also be routed to the receptionist and if the receptionist doesn't answer, the call can then be sent back to the intended person's voicemail.

The ShoreTel system also supports the bank's small group of Citrix users. This allows these users to transfer their extension to their Citrix workstations and access voicemail and ShoreTel features without the need for ShoreTel software running on their computer.



Finally, ShoreTel's ShoreWare Auto-Attendant provides 24-hour automated call answering and routing capabilities for the bank, and outgoing prompts can be customized and linked to the time of day, day of week, holidays, etc. Individual groups can also have their own menus with unique greetings and options.

“One winter, we had to close early due to bad weather, so I just programmed the auto-attendant from home so the phones wouldn't just ring when a customer called but it would provide helpful information about the closing and when we'd be re-opening,” said Genske. “Customers need this level of information to remain satisfied.”

POISED FOR GROWTH

Community Bank & Trust is constantly growing—adding employees and new branch locations. ShoreTel easily scales to meet those growth demands. The bank plans on working with ShoreTel through its growth spurts.

“To bring online the branch we most recently added, everything took about a day – from hooking up phone lines, putting in the ShoreTel gear and deploying the phones,” said Genske. “This would've taken just under a business week with the old system. The ease of managing the ShoreTel system plus the flexibility to tie multiple branches together – these things are invaluable to us. We are able to say yes more to our internal employees, and having a great phone system allows us to provide exceptional customer service to outside callers.

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