ShoreTel

Industry: Financial
Installation: 9 locations, 45+ ShoreGear
voice switches,
1,110+ ShorePhones
Date of Install: December 2005

ResMAE
Mortgage lending done right™

Challenge:

ResMAE had an outdated Toshiba system that was maxed out in terms of users and didn't offer the robust features the organization knew were available in VoIP solutions.

Solution:

ShoreTel provided 45 ShoreGear voice switches and over a thousand ShorePhone IP telephones for ResMAE's nine U.S. locations.

Benefits:

- ShoreTel integration with Citrix allows ResMAE to capitalize on features without PCs on every desk—Windows terminals provide the same features desktop computers would deliver.

- The ability to manage the system in-house with a limited staff saves money and time.

- Robust features of the ShoreTel system enhance employee productivity.

- Workgroup functionality improves customer service for internal and external customers.

- Distributed architecture of the ShoreTel system improves telephone system reliability and ensures high availability.

RESMAE MORTGAGE CASHES IN ON RELIABILITY BOOST AND DECREASES ADMINISTRATION COSTS
Specialty Finance Company Moves to ShoreTel VoIP

ResMAE Mortgage Corporation, a subsidiary of ResMAE Financial Corporation, is a specialty finance company that originates, sells and services sub-prime residential mortgage loans. With corporate headquarters in Brea, California, ResMAE continues its commitment to customer service with regional processing centers nationwide, including Northern and Southern California, Texas, New Jersey, Illinois, Florida and Hawaii.

BANKING ON VOIP

In early 2005, ResMAE had outgrown its PBX-based telephone system in terms of users it could support, and the organization was not satisfied with the features or capabilities it offered any longer. Executive Vice President and CIO Christopher Lappi knew that he wanted to transition to Voice over IP (VoIP) because he'd seen some solutions and liked the features offered. The company put together a list of requirements and sent this out to some prospective vendors, including 3Com, Avaya, Cisco, and ShoreTel.

Lappi and his team put together a list of priorities for VoIP solutions, which included ease of implementation and administration, high availability and reliability, and cost-effectiveness. ResMAE saw product demonstrations, conducted site visits and reference checks, and worked with each of the solutions. One vendor was too cumbersome and costly to implement in the timeframe ResMAE needed, and it was also a less flexible solution that required more equipment. One vendor was unable to meet ResMAE's redundancy needs without an engineering overhaul, and the other vendor's product was not very intuitive in terms of implementation and management. After working with ShoreTel in a test environment, ResMAE chose the company for its VoIP needs.

"We were already familiar with ShoreTel from years earlier and knew we wanted to go with them pretty early on," said Lappi. "ShoreTel gave us a switch and a couple dozen phones to work with so we could experience it. We knew immediately this was the solution for us and one that could easily migrate to meet our future needs."

THE SWITCH PAYS OFF

ShoreTel provided ResMAE with more than two dozen ShoreGear 120/24 voice switches and approximately 20 ShoreGear-T1 voice switches. In addition, to the ShoreTel switches, ResMAE has also deployed—and standardized on— ShoreTel ShorePhone 530 IP telephones, of which they have more than 1,100 across nine sites. Lappi was able to implement the entire ShoreTel system with just two full-time and one part-time staffer in under three months.

UNIFIED SYSTEM INCREASES PRODUCTIVITY

ShoreTel phone systems are easy to use, simple to manage, flexible, and reliable. With the ShoreTel system in place, all ResMAE 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. The least-cost routing capabilities allow the organization to minimize costs by avoiding toll charges. For instance, if an employee in an office in Texas is calling a customer in Florida, the call is routed through ResMAE's data lines, through the Florida office, and out to the customer, thus bypassing toll charges.

"The quality of sound on the ShoreTel system is excellent," said Lappi. "I was demonstrating the phone to the president of the company, so I dialed a 4-digit extension for someone on my IT team from my California office. The president was so impressed with the voice quality, he assumed that the person to whom we were talking was in a local office. When I told him that the employee I called was actually in Illinois, he was just that much more impressed with ShoreTel. It is like night and day compared to the old system."

The ShoreTel system, integrated tightly with ResMAE's Microsoft Outlook application, provides integrated messaging, such as directory dialing, contact screen pop, and calendar integration. It is integrated with Outlook via Citrix, which allows ResMAE to use Windows terminals (rather than PCs) for each employee and run applications from the remote server. This means that in addition to ShoreTel's highly functional telephones, ResMAE employees enjoy unified messaging with voice mail messages delivered to their email inbox, desktop call control allows them to control the way their phones work, and features like Find Me allows them to have calls track them down wherever they are—at their desk, on their cell phone, or at home if they choose; and they have all this without a need for a personal computer on every desk.

"Users who travel consistently like getting their voice mail over e-mail," said Lappi. "Travelers can see who's calling on their Blackberry mobile devices because voice mails are right there in their e-mail client. ShoreTel is great in terms of portability. Managers who travel can easily log into the system from anywhere and it's just as though they're sitting in their own office. All of the ShoreTel functionality is available to them from anywhere they happen to be working."

With the ShoreTel solution, ResMAE employees spend less time navigating complex telephone systems and more time performing critical, revenue-producing tasks. The friendly, graphical interface of Call Manager provides easy access to sophisticated features, including on-the-fly conferencing.

ResMAE 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 exceptional level of information, operators not only connect callers faster than ever, but also give them the highest level of professional service. Furthermore, dynamic, online directories eliminate

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![ShoreTel logo]

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. "The ShoreTel system was definitely a culture shock for some of our operators going from a traditional receptionist console, but now they just love it," said Lappi.

In addition to the vast information receptionists have at their fingertips, ResMAE can also centralize their reception staff in one office. Incoming calls to any remote office are given the option, via the ShoreTel auto-attendant, to press "0" to be routed to a receptionist, and the call is automatically transferred to the reception staff in California. From there, the call is directed wherever necessary, and all of these steps are transparent to the end user.

WORKGROUPS ENHANCE CUSTOMER SERVICE

ResMAE utilizes a number of different workgroups, including one for the IT Help Desk. ShoreTel Workgroups made the creation and management of these teams easy. "We have a group of people answering helpdesk calls and the workgroup is set up such that if everybody's on the phone, the caller is placed in queue and the system lets the caller know how long the wait is expected to be," said Lappi. "The ShoreTel system also allows us to distribute information during these wait times."

RESMAE ENJOYS IMPROVED SYSTEM RELIABILITY

In addition to powerful user features, ShoreTel's Call Control software is distributed to every voice switch, which eliminates any single point of failure in the system. In the unlikely event of a ShoreGear voice switch failure, other switches on the network will automatically take on the call-processing load so no call into ResMAE is ever dropped.

"I cannot say enough about ShoreTel's redundancy and remote survivability," said Lappi. "We've had situations where a switch failed but it was transparent to users and callers. ShoreTel worked around it so calls got through, and nobody knew anything had happened. Business continued as usual."

SHORETEL SIMPLIFIES MANAGEMENT

ShoreWare Director, ShoreTel's browser-based management interface, allows ResMAE network administrators 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, an administrator simply clicks "add new" and enters the user's name. Then, the centralized database and voice switches are automatically updated, and for the user, a new mailbox is created and the automated attendant dial-by-name and number feature and online directories are updated—all in a matter of seconds. Changes can be made just as quickly and easily.
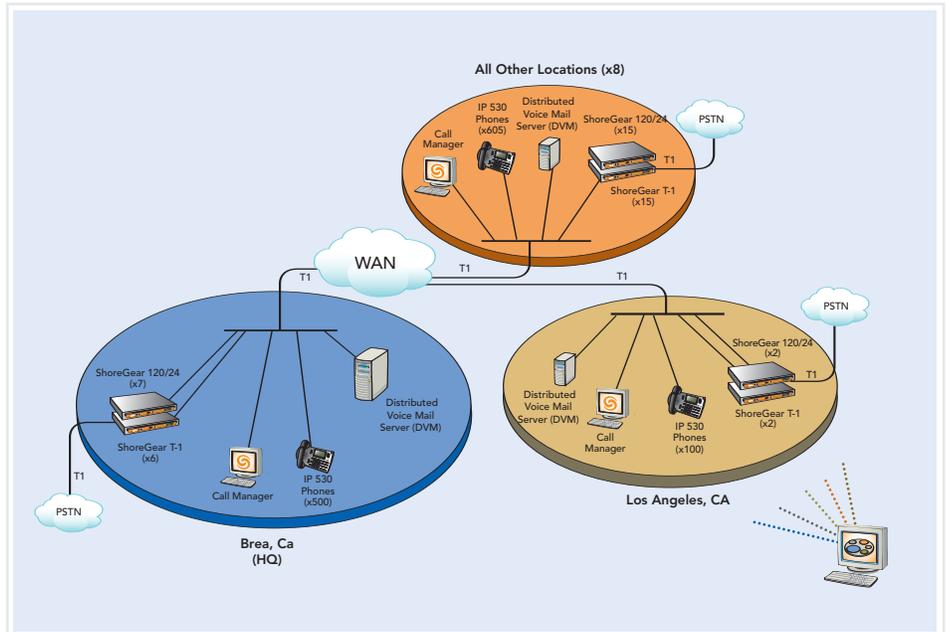
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"We no longer need to use a third party to maintain our telephone system," said Lappi. "We handle moves, adds and changes, and we are able to easily re-configure things as we need to using ShoreWare Director. The cost to maintain the ShoreTel system with our own staff is much less than what other systems would have cost us."

SOLD ON SHORETEL

ResMAE is pleased with its decision to go with ShoreTel and appreciates that the system is scalable and flexible to keep up with the organization's growth rate. "We've seen improved productivity and internal communications, as well as enhanced customer service and overall system reliability," said Lappi. "We're a satisfied ShoreTel customer and look forward to many years of growth with our ShoreTel VoIP system."

ResMAE Mortgage Corporation deployed ShoreTel to 10 locations with over 1,110 phones.

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