



A Case Study

How Hosted VoIP
Business Communications
Benefits a Mobile Workforce



Leveraging VoIP for Multi-site Offices

How DOTVOX helped strengthen key communication points in financial services industry.

INTRODUCTION

The modern financial industry landscape requires agile yet reliable unified communications solutions to support sales and customer service efforts.

An industry leading mortgage banker experienced issues with unified communications throughout their multi-site offices. Existing phone features were limited and service from their provider proved subpar. DOTVOX customized a VoIP solution that leveraged telephony-rich features, seamless integrated with their processes, and saved 50% of total operating costs.

The solution outlined in this case study demonstrates the high value generated through a collaborative effort between DOTVOX and the client's organization.

THE CHALLENGE

Productivity – With nine offices across the U.S. and 250 employees, company resources had to be shared quickly throughout the organization. The client required complex communication infrastructures to connect each agent, branch, and operations into one ecosystem. Unified communications were essential to improving sales flows and customer service management, the bloodline of providing financial services.

Existing telephony networks and features limited the company's ability to stay agile, and their provider's exceptionally long response time would negatively impact performance and directly delay timelines of new projects.

SOLUTION

In a collaborative effort, the DOTVOX team lead an effort to design a VoIP network, customized to support the client's processes and objectives. DOTVOX deployed a dedicated team of unified communications specialists to implement the following solution:

Client Background

COMPANY

Nationwide Leader in Financial Services

INDUSTRY

Financial Services – Mortgage Lending

EMPLOYEES

~ 250

PRODUCT / SERVICES

- VoIP Phones
- DOTVOX
- 24/7/365, U.S.-based Support

ABOUT

Based out of Arizona and licensed in 30 states, DOTVOX's client is a personal home loan / mortgage originator with the ability to deliver conventional, VA, USDA, Reverse, FHA, Non-Conventional, Jumbo and HARP 2.0 products to their customer base. With 250-plus users in the company, DOTVOX's client was looking for a new telephony and VoIP solution that would better meet their needs and ongoing demand for 24/7/365, U.S.-based support.

1) Cloud-hosted VoIP: A cloud-hosted VoIP network provided the client with a robust infrastructure that integrates multi-office communications into a single environment. The built-in disaster recovery would mitigate any downtime and ensure business continuity even if disaster strikes. DOTVOX's national POP presence would clear latency issues typical of on-premise PBX phone systems or outdated servers.

2) Feature-rich: The client is able to leverage sophisticated VoIP features ideal for multi-site offices to improve internal and external operations.

- a. Hoteling:** Enables a user's profile to be temporarily loaded onto any shared (host) phone, transferring the user's extension, tools, and contacts.
- b. Mobility:** Provides access to company's VoIP network and PBX features through desktop, desk phone, mobile phone, or tablet while maintaining a single business identity.
- c. Hunt Group:** Inbound sales calls were automatically directed to a predefined group of extensions within the VoIP network, limiting missed calls rates and allowing the client to handle high call volumes with ease.
- d. Receptionist Client:** Consolidates need for multiple front-of-house receptionists into one telephony attendant console that has the capability to manage multiple locations.
- e. Call Center:** Features designed to manage service methods and schedule reporting improves overall customer service.

3) 24/7/365 U.S.-based Support: Starting with an easy onboarding process, DOTVOX support provides stellar ongoing support to ensure the client's VoIP system is running at optimal performance. Immediate response from dedicated Account Managers allows the client's IT personnel to allocate valuable resources to more pressing matters.

4) 50% Cost Savings: DOTVOX was able to deliver an enhanced VoIP solution, customized feature-set, and dedicated account management while reducing total cost by 50%.

THE RESULT

The promise of 50% Cost Savings was a key draw for the client and has been delivered upon.

Having access to timely 24/7/365 support, a central management tool for telephony across locations and ease of implementation for new users were all improvements upon the previous solution.

Business and employees are now able to work more efficiently. Processes around communications are streamlined. IT staff is more productive, receive 24/7/365, U.S.-based support from DOTVOX within hours, allowing them to focus on maximizing the value IT delivers for the business and maintaining their competitive advantage in the financial services industry.

CONCLUSION

Beyond the cost savings, management and efficiency benefits, our client has been able to leverage Trapp's expertise in other areas of their IT. Having a one stop shop for VoIP, IT Services and Project Management as well as cloud hosting has been invaluable to the client and has allowed them to fill skills, expertise and bandwidth gaps when they have arisen.

Visit [DOTVOX.com](https://www.dotvox.com) for more information.



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