

## Top Business Improvements ShoreTel Delivers to Financial Institutions

### 1. Connect with an Investment Specialist

*Increase deposits.* An investment specialist is a limited resource typically shared among multiple locations. As this specialist moves from office to office, they become difficult to reach. With a ShoreTel solution and the AnyPhone feature, the specialist can assign their extension to any telephone on the network - at any site. When an employee needs to reach the specialist, they always dial the same extension. For example, if a teller at a branch accepts a large deposit from a member, the teller can immediately connect the member standing in front of them to the specialist regardless of their location. This enables an immediate connection between the member and the investment specialist - rather than an outbound call days later based upon a transaction report of large deposits.

### 2. Tracking Caller ID for Collections

*Reduce days outstanding, decrease defaults.* The ShoreTel solution provides collections workers with detailed Caller ID information, which speeds collections and decrease defaults. The Caller ID is recorded at the user's desktop as well as by the system itself. Even if a delinquent member calls after hours, the Caller ID is captured so the collection officer can return the call. The collection officer also is able to collect additional numbers for the member if the member calls in from a cell or work phone.

### 3. Click to Dial for Collections, Loan Processing and the Call Center

*Increase productivity, improve customer satisfaction.* The Personal Call Manager provides a QuickDialer and supports Drag-and-Drop calling, making organizations more efficient. For example, a collections officer can leverage a spreadsheet by simply highlighting a phone number and using drag-and-drop to place the call. Or a loan agent can click on a voice message record that appears in their Outlook e-mail client to call back a prospect. Or a call center agent can leverage shared directories exposed through the QuickDialer to call investors, corporate clients and business partners.

### 4. Outlook Contacts Screen Pop-up for Loan Processing

*Increase productivity, improve customer satisfaction.* The Personal Call Manager integrates seamlessly with Outlook Contacts. For outbound calls, a loan officer can dial directly from Outlook and take notes about the member within the Outlook Contact form. For inbound calls, the system pops up a screen based on Caller ID (work number, home number, cell number, etc.). The agent can examine the notes as well as take additional notes to help speed the loan processing.

### 5. Centralized Operator

*Reduce operational cost, Increase customer satisfaction.* With a ShoreTel solution, a centralized operator can service the needs of multiple locations and thus reduce operational costs since an operator is not required at every site.

### 6. Centralized Call Center

*Increase productivity, improve customer satisfaction.* With a ShoreTel solution, a centralized call center can be deployed and service the needs of the entire organization.

**7. Virtual Call Center**

*Increase productivity, improve customer satisfaction.* During times of heavy inbound call volume, additional agents from other departments, branch managers or assistant branch managers can join the call center. During times of light work activity, employees can be used for outbound call activities (e.g., telemarketing).

**8. Local Touch by the Call Center**

*Improve customer satisfaction.* Institutions can provide a "local touch" by retaining local numbers for each branch even though calls may be answered centrally. Centralized agents are provided routing information on the call for a "localized" greeting.

**9. Scalable solution for the IT Staff**

*Increase business [increase assets, increase lending].* The ShoreTel system is completely scaleable and flexible, allowing for rapid, easy deployment. Growing financial institutions can add a new branch by simply adding a ShoreGear voice switch at the new location. Mini-branch offices can be added to marquee locations (e.g., a lending office in a car dealership or branch office in a grocery store). And since nearly all institutions have some existing voice solutions, ShoreTel can be rolled out in a phased manner based on business drivers (e.g., new branch, location move, centralization of call center, etc.).

**10. Ease of Management for IT Staff**

*Reduce operational costs.* Financial institutions have multiple locations. With ShoreTel, branch locations do not need local IT staff since the system can be centrally managed from anywhere.