

CASE STUDY:



PanTerra Networks
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COMPANY PROFILE

Donny Hurwitz, President

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Evolve Financial offers banking, investment and wealth management services. Evolve focuses on delivering personalized relationship-based services through banking and trust offices in major metropolitan areas including: Memphis, Dallas, Austin and Tucson. Evolve services include banking through Evolve Bank & Trust, brokerage through Evolve Securities, Inc., and Investment Advisory through Evolve Securities, Inc. or AFS Investment Advisors, Inc. Evolve continues to raise the bar through the use of advanced technologies that enables the company to deliver superior customer service. Growth and success come from client satisfaction and are measured in many ways.

SITUATION

The company operated independently out of multiple offices because of technology limitations, but utilized employee services across the organization. The operations required significant manual intervention and inefficient processes including call backs, expensive location calling, voicemails and long delays for basic information between employees and clients. Finally, there was valuable information that needed to be shared with clients and staff that could not be sent electronically. Evolve recognized they needed to improve both their service levels and accessibility, while lowering their exorbitant communications costs.

CHALLENGES

Having a number of communication products and services that are delivered in a disparate manner and deployed across multiple locations made it difficult to standardize and nearly impossible to implement even the smallest changes. The communications tools were quickly becoming outdated, requiring extensive maintenance and in some cases, replacement only to deliver the same fragmented end result. Donny Hurwitz, Evolve President, recognized their ability to continue to raise their service bar was being hindered by their technology limitations. Additionally, new communications methods such as instant messaging, text messaging, desktop collaboration and web conferencing were being requested by clients and staff. Donny realized that in order to deliver top notch services, Evolve needed competitive unified communication tools. These tools would enable his company to increase its communications reach, improve customer responsiveness and ensure rapid staff adoption of these new mediums of communication.

SOLUTION

PanTerra's solution is the world's first completely cloud-based Unified Communications service designed for small and medium-sized enterprises (SMEs) consisting of geographically dispersed

offices and or employees. The advantage of PanTerra's solution cloud-based delivery to Evolve was independence of skills to their geographical location in addition to new mediums of communication now available to staff, clients and new business prospects. Since Streams seamlessly includes numerous communication services such as business voice, multimedia conferencing, web collaboration, fax, instant messaging, email, desktop share, and presence from one interface, it addressed all their communication needs and eliminated the fragmented use and limited mediums their previous solutions offered.

Donny Hurwitz, President of Evolve Securities, said, "When PanTerra's solution was deployed, improved customer responsiveness and satisfaction were noticed by both our clients and staff. As an organization we experienced a total cost of ownership reduction across all locations while our additional communication tools resulted in improved operational efficiencies."

BENEFITS

- Voice benefits gained included leveraging its unique service infrastructure to increase hours and expertise to include staff skilled from all locations regardless of time zones and location.
- Evolve was able to set up extension dialing between all locations making internal calling more effective.
- Unique automated call routes were set up for each location to route callers to functional experts.
- Complete company visibility to operators using presence; administrative assistants were now able to screen executive calls from anywhere.
- Find me - follow me allowed staff to remain accessible by phone
- Voicemail to email with transcription allowed staff to review messages from anywhere.
- Instant Messaging used by staff increased speed of information flow; while MobileMessage enabled staff to quickly communicate with remote users via cell phone messaging.
- Deskshare is now extensively used as a policy for staff to share valuable information when sending data is not an option.
- New business development plans include webinars which allowing analysts to present valuable information to prospects and clients.
- Total reduction of communication cost and complexities with significant increase of features, benefits, sales, and customer satisfaction. All transactions securely made and stored for compliance. Additionally, since there are no applications to install, IT staff resources requirements were significantly reduced.