



CUSTOMER CASE STUDY

Cameron & Roberts Insurance Agency, Inc.

TeleVantage Helps Improve Productivity and Service, While Saving Money

Problem

- Cameron & Roberts's phone system reached its limits and could not accommodate new technology.
- Dependency on a service vendor was not only costly and inefficient, it was also hindering the agency's growth.
- The staff needed additional telephone features that would save time and increase their productivity, while improving customer service.

Solution

- Cameron & Roberts chose TeleVantage, a software-based phone system, to improve overall customer satisfaction and provide personalized service.
- The system's Windows-based interface provides complete call and message control from a PC desktop.
- Ease of use and advanced features has quickened response times and streamlined business processes.

Result

- With TeleVantage, Cameron & Roberts now saves almost \$30,000 a year in costs previously associated with service contracts, legacy hardware maintenance, and phone lines.
- Employee productivity has improved by almost 20% with the call handling and routing features of TeleVantage.
- The system's flexibility and open architecture complements the agency's growth plan while assuring their investment.

Cameron & Roberts Insurance Agency, based in Lithonia, Georgia, specializes in delivering full insurance services to both personal and business customers. Their goal is to provide the best service possible by tailoring products to meet their customers' unique needs. As Sean Cavin, Cameron & Roberts' Systems Administrator, says "we are all about service".

Yet Cameron & Roberts' realized that their phone system was limiting their abilities to accomplish their directive since it lacked basic capabilities, was unable to scale with business growth, and provided unreliable service. With customer satisfaction jeopardized and productivity hampered, the agency decided to implement a new phone system.

Easy to Use and Maintain

The new system needed to be a reliable, easy to use, feature-rich solution that could meet current and future business needs. In addition, Cameron & Roberts wanted to receive the same quality level of service that they impart. The agency found their answer in TeleVantage, Vertical's software-based phone system. "Once we saw the features, we were sold," notes Cavin.

After the smooth installation, Cavin found that modifying the system could be easily managed in-house. Previously, the agency was dependent on an expensive outside service vendor for routine changes as well as maintenance of their legacy hardware. Eliminating this need and performing their own maintenance,

such as moves, adds or changes, along with the installation of a T1 line to replace POTS lines, enables Cameron & Roberts to save time and almost \$30,000 annually. “This money can be used to address other needs of the agency,” says Cavin.

The Windows-based interface provides complete call and message control from a PC desktop. Since it looks and feels like other Windows’ applications, it is easy to learn and use. “New employees used to take a week to get acclimated to the phone system. But with TeleVantage, new employees are trained in 15 minutes and comfortable in an hour and a half,” notes Cavin. With a simple point and click, Cameron & Roberts staff can easily transfer calls, establish conference calls and prioritize voice mails.

TeleVantage keeps agency customer-focused

Cameron & Roberts has seen the improvement in the level of service they can deliver with TeleVantage, exemplifying their commitment to customers. With flexible routing lists and availability status instantly viewable on the user interface, customers are no longer waiting while the receptionist searches for the person requested.

TeleVantage has eliminated the endless telephone tag that the staff used to play – voice mail ensures that no customer or time-critical call goes unattended. Providing a quick response to inquiries has not only dramatically improved customer satisfaction, it has helped the agency acquire new business as well. “Our customers have noticed that response time has improved, so they find us more reliable,” says Cavin.

The ability to create personalized greetings, which can be changed easily, adds another dimension to the agency’s service. “We can customize greetings on the fly,” notes Cavin. TeleVantage recognizes the caller ID of the incoming call and automatically plays the individual greeting, whether to provide a customer with an important update or offer special treatment to VIPs. This level of customization has helped the agency increase service and promote customer loyalty.

Increases Professional Productivity

With the advanced call handling features of TeleVantage, including routing lists and Direct Inward Dialing (DID) numbers, Cameron & Roberts was able to manage their 500 daily calls more proficiently. “We’ve picked up a lot of efficiencies across the board,” notes Cavin.

The voice mail feature alone has had a significant impact on the agency. By enabling customers to leave information-rich messages, each staff member has saved 30-45 minutes a day making unnecessary calls. In addition, the TeleVantage enables the staff to manage multiple calls, share voice mails, and retrieve call information from the call log. These enhancements translate to a 20% increase in productivity for the agency.

“I am fully confident that TeleVantage has been the lone factor in the increased volume of business that we handle on a daily basis,” raves Cavin.

For the Cameron & Roberts’ team, being out of the office doesn’t mean being out of touch. Previously, if a broker was out of the office for the day, he or she could not pick up their messages until they were back in the office. Now, with TeleVantage, the staff is able to stay connected, which has delivered impressive results. Remotely accessing a voice message provides a tremendous advantage in efficiency and convenience, allowing for quick response to customers and prospects. “We have been extremely pleased with the performance,” says Cavin.

TeleVantage – Poised for Growth

“The previous service vendor didn’t understand how the phone could help us operate better as a business. TeleVantage fits our business model, giving us the flexibility to grow and adapt while exceeding current

standards of customer service,” notes Cavin. The open architecture of TeleVantage provides Cameron & Roberts with the flexibility to expand the system as the business grows. With plans to integrate TeleVantage with their CRM software, Cavin has no doubt that the agency’s investment will continue to deliver value. “We’ve been very happy with TeleVantage so far and we look forward to it serving our needs long into the future,” praises Cavin.

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