



Customer Profile/**SNL Financial**

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—Brian Wheeler

Chief Information Officer

SNL Financial

Keep Those Phone Lines Open

Conscientious businesses measure success through effective customer relationships. Few organizations take that adage to heart as much as SNL Financial. They view technology as a tool that can enhance their personal interactions with customers. SNL Financial dramatically improves its ability to deliver superior customer service with the use of Cisco IP Phones and Cisco Unity unified messaging delivered over a Cisco AVVID network. They’ve also laid the groundwork for future Web/CTI integration in their call centers with Cisco IP Contact Center.

Background

Based in Charlottesville, Virginia, SNL Financial collects corporate, market, financial, and merger and acquisition data on companies in the financial, energy, and real estate industries. It presents its findings to its customers via several online databases and Internet applications, e-mail, fax, and print publications. Its primary customers are large investment bankers, institutional investors, and industry executives. SNL Financial currently employs approximately 250 people in 4 locations; besides its

headquarters, it has offices in Hoboken, New Jersey; Arlington, Virginia; and Springfield, Illinois.

Committed to delivering the highest quality information to very demanding customers, SNL Financial relies upon carefully cultivated business relationships to both gather and disseminate data, and has enjoyed ten years of uninterrupted profitability and growth as a result. SNL Financial is a longtime Cisco Systems customer, and has developed an information technology (IT) staff with expertise in Cisco solutions. The staff focuses on providing employees with easy-to-use applications and technology systems that enhance their ability to deliver superior customer service. These applications support their desire to deliver current, accurate information to clients in the most effective ways possible.

Challenge

As SNL Financial grew along with the market successes of the late 1990s, it outgrew its existing Toshiba private branch exchange (PBX) telephone system. “We needed to grow our Charlottesville campus into multiple buildings,” says Brian Wheeler, Chief Information Officer at

SNL Financial. “The Toshiba platform wouldn’t allow us to do that. We needed to find a telephone system that could be geographically disbursed in downtown Charlottesville and support substantial growth in the number of staff. The cost of purchasing another phone system or reconfiguring what we already had for that office would have been huge. We knew a forklift upgrade was necessary.”

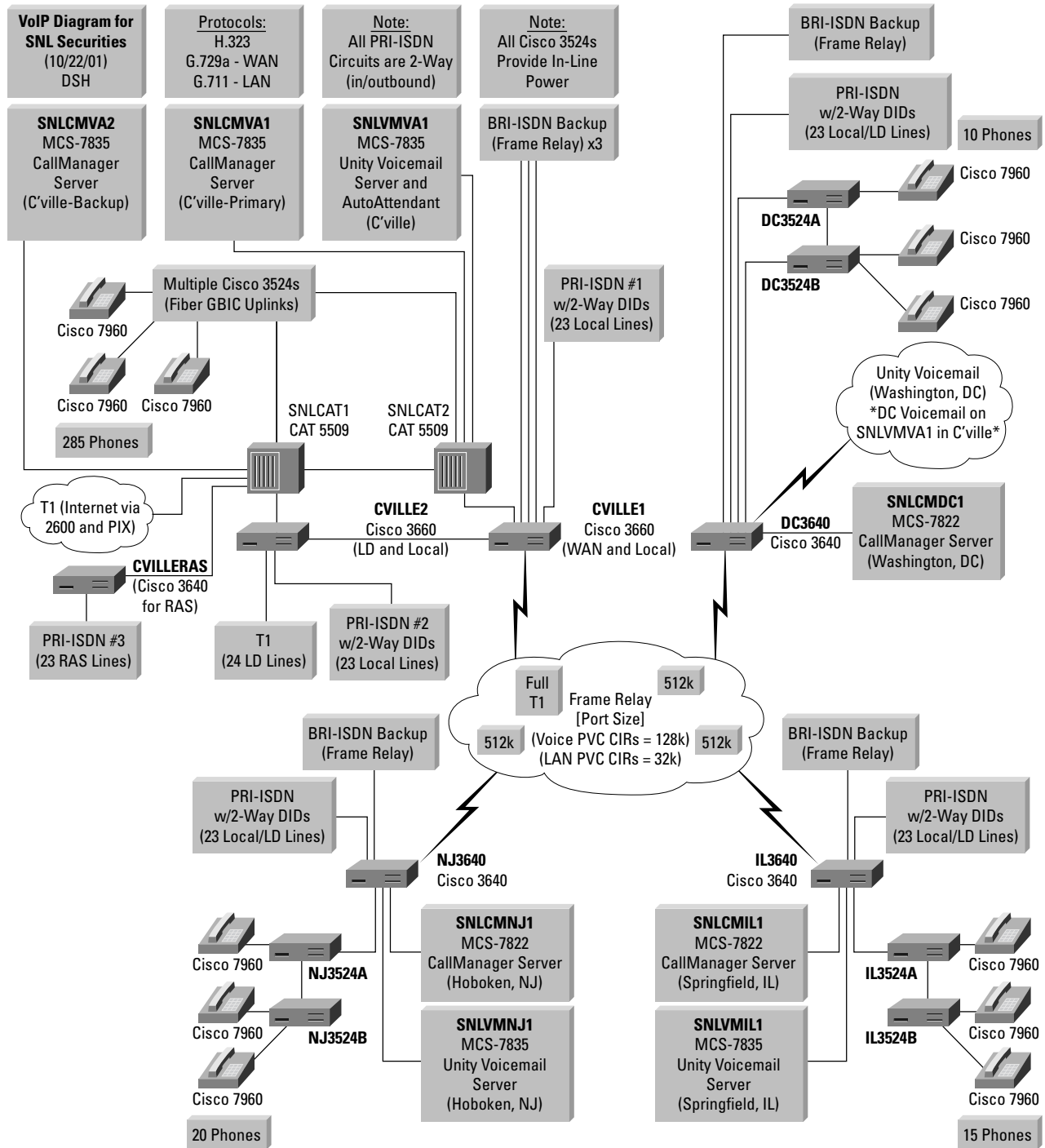
More importantly, the IT staff is always looking for more effective technology tools, and found that converged networking offered new possibilities for sophisticated applications that enhance productivity, reduce operational overhead, and improve customer service. Adds Wheeler, “We looked at having a converged network because we wanted a telephony platform that supports unified messaging and CTI [computer telephony integration] applications. We picked Cisco IP telephony because Cisco is clearly the leader in voice over IP at the high end. Voice over IP makes a lot of sense to us because we already have expertise in Cisco technology. Our data and voice staff were already the same people. Cisco has technology that we would be confident to use and deploy at all our sites. It marries very well with our existing network.”

Solution

SNL Financial upgraded its existing Cisco switched LAN to enable Cisco AVVID (Architecture for Voice, Video and Integrated Data). It kept its two existing Cisco Catalyst® 5500 backbone switches in Charlottesville, upgrading them to enable a Gigabit Ethernet backbone. It also kept its existing Cisco 3600 Series routers that provide WAN and Internet connectivity at each of the branch offices, enabling them for voice traffic with the proper WAN interface cards (WICs). Wiring closets at all locations have new Cisco Catalyst 3524 switches because they support inline power to over 330 Cisco IP phones (Figure 1). “The Cisco 3500 switches gave us more bandwidth, but more importantly, they can handle the quality of service we need to support voice traffic,” says Wheeler.

Figure 1:

SNL Financial IP Telephony Network



Sites between cities are interconnected via a Frame Relay WAN. In Charlottesville, three primary-rate interface (PRI) lines provide connectivity to the public switched telephone network (PSTN). Because SNL Financial depends so heavily on its phone system for doing business, it took the extra step of installing redundant Cisco CallManagers in Charlottesville and independent Cisco

CallManagers at its satellite offices. For voice mail, SNL Securities® installed Cisco Unity® voice-mail servers in every office except for Arlington, which connects to the Cisco Unity server in Charlottesville. At each satellite office, voice services remain

operational with Cisco Survivable Remote Site (SRS) telephony in the Cisco 3640 Router and dialup ISDN backup lines for the WAN in case of a Cisco CallManager or WAN outage.

Cisco Unity adds valuable new time management capabilities to technology services at SNL Financial. End users have headsets that they connect to their PCs to listen to messages. The onscreen display lets them sort and prioritize voice-mail and e-mail messages, and the unlimited save feature lets them keep messages as long as they want without suffering the automated purges of the old PBX. Users also take advantage of the alerts within Cisco Unity to provide pager, mobile phone, or alternate phone numbers so that important customers can get hold of them. "We want to ensure that our customers have a way to get information that's important to them through to us," says Wheeler.

The staff also benefits from ad-hoc, "meet me" conference calls. "All the commands are right there on the IP Phone's LCD display," says Wheeler. "On our Toshiba system, every time I wanted to transfer a call, I had to crack open the manual and teach myself how to do it. The first time I transferred a call on the Cisco IP Phone, I did it just by following the prompts on the display. The more confident our staff is about transferring and conferencing phone calls, the more professional we're going to come across to our customers."

SNL Financial's call centers provide technical support for database products and sales calls. It is preparing to incorporate CTI and Web integration into its call centers with Cisco IP Contact Center (IPCC) in the near future. This is important for customer service because "sometimes the person that can best answer a client's question is not in the office that takes the call," says Wheeler. "One of the reasons we wanted to converge our voice and data networks was to facilitate customer support and transfer their calls between offices."

Service and Support

SNL Financial hired Dimension Data to design the Cisco AVVID network with Cisco staff. Dimension Data also assisted with installation in the Charlottesville offices. At the remote offices, Wheeler and his staff did much of the installation themselves, explaining, "This stuff is extremely time-critical. Time means dollars, and we could deploy on our own schedule versus a third-party vendor schedule. If we were trying to install a PBX and a separate data network, we would have had our staff setting up the data network and would have had to call outside consultants to put in the PBX.

"Any time I've needed any help, I call up the TAC [Cisco Technical Assistance Center] and get an answer in a short period of time. One guy I talked to consistently kept following up to make sure his recommendations were working until the matter was resolved. Once I knew what I was doing, it was a breeze to get things up and running. Now we have the advantage of a similar phone system in each office that our network engineers know how to support." Wheeler also likes that parts for his new network are readily available.

Results

"The Cisco phone system saves us money in that now, wherever I can get data, I can also get voice," says Wheeler. He reports that the PRI circuits have reduced local dial tone expense by 33 percent, approximately US\$25,000 per year. SNL Financial also enjoys savings in long-distance toll charges, and avoided the expense of retrofitting the Toshiba phone system to make it CTI-friendly.

Yet while cost savings are always a plus, that is not the most important return on SNL Financial's investment. Says Wheeler, "Everybody wants to leave their customers with the best impression possible, and we think having this phone system is certainly going to let us do that."



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