

# Insurance Broker Delivers High-Touch Service to Exclusive Clients

Executive Planning International Life Insurance builds collaborative relationships with clients and business partners.

EXECUTIVE SUMMARY
<p><b>EXECUTIVE PLANNING INTERNATIONAL LIFE INSURANCE</b></p> <ul style="list-style-type: none"> <li>• Industry: Insurance</li> <li>• Location: Aurora, Ontario</li> <li>• Employees: 7</li> </ul>
<p><b>CHALLENGE</b></p> <ul style="list-style-type: none"> <li>• Provide personalized service to high-profile insurance customers</li> <li>• Improve communication and responsiveness for highly mobile workforce</li> <li>• Maximize network and phone reliability with fast, simple troubleshooting and management</li> </ul>
<p><b>RESULTS</b></p> <ul style="list-style-type: none"> <li>• Running voice and data communication over single network saves C\$1000 a month in phone charges</li> <li>• Rich conferencing features improve collaboration and help reduce time and expense of travel</li> <li>• Support for remote voice and data networking helps employees respond to customers faster and improve competitiveness</li> </ul>
<p><b>SOLUTION</b></p> <ul style="list-style-type: none"> <li>• Complete Cisco small business solution supports voice, data, video, security, and wireless capabilities in one affordable network device</li> <li>• Remote management delivered by Cisco partner lets EPILI enjoy maximum performance and reliability</li> <li>• Built-in data and physical security helps protect confidential business information</li> </ul>

## Business Challenge

For more than 40 years, Executive Planning International Life Insurance (EPILI) has offered innovative strategies to help clients meet their financial responsibilities. The company offers a wide variety of financial services, including life and health insurance, tax strategies, corporate planning, and executive benefits. EPILI has earned a reputation for personalized, responsive service that is tailored to meet its clients' needs.

"We have several high-profile clients, and we have to stay in constant contact with them," says Matthew Fincham, consultant at EPILI. "We serve professional sports organizations and individuals with a high net worth. Clients at this level expect the best service, and if we can't meet their expectations, someone else will."

To deliver high-touch, personalized service that clients demand, EPILI depends on responsive communication well beyond normal business hours.

"Some people shut their phones off at 5:00, but we're not like that," says Fincham. "If a client is located in another part of the world, I might get an email at 10:00 or 11:00 o'clock at night. If I'm up, and I hear an email come in, I respond."

EPILI has a very dynamic workforce, with employees working from home, on the road, or at clients' offices.

"Several of us are out on the road much of the time, meeting with clients," says Fincham. "We tend to work from the top down in the insurance industry, so most of the time we are dealing with business owners. Our employees are very mobile and out and about."

To continue to stay ahead of the competition, EPILI needed a complete communications solution that could support all of its phones and messaging services, as well as data communications. Because EPILI is a small organization with just seven employees, the solution would have to be affordable and simple to manage and use.

## Results

EPILI replaced its office phone system with the Cisco® Smart Business Communications System (SBCS), which provides voice, data, video, and wireless networking. The new Cisco solution lets EPILI take advantage of inexpensive Session Initiation Protocol (SIP) phone lines to dramatically reduce phone charges.

“We use our Cisco solution for all our voice and data communication, which has been a tremendous savings for us,” says Fincham. “We used four analog phone lines in the past, for which we paid C\$1200 a month long distance. Now we utilize SIP lines on our network, and we save more than C\$1100 a month on long-distance charges. It has been a great product; the sound quality of the Cisco Unified IP Phones is stellar.”

More importantly, the Cisco solution helps EPILI communicate with clients better, and deliver superior, more responsive service, from anywhere. Using secure virtual private networking (VPN) technology, employees can remotely login to the office network to check email or receive a phone call directly on their PC.

“Cisco has really helped us stay in contact with clients, no matter where we are or what we are doing,” says Fincham. “Until recently, we didn’t take many vacations, because we didn’t want to be away from the office. Now with Cisco soft phones and VPN technology, being out of the office is not an issue, because we can manage clients as well as we can when we’re here. Thanks to this solution, we don’t need to have satellite offices, because we can stay productive even when we are traveling.”

Incoming phone calls and voice messages are forwarded directly to an employee’s cell phone, so they never miss a call, even when they are working on the road.

“As a mobile employee, it’s great to be able to check messages forwarded to my cell phone,” says Fincham. “It’s one step less than having to call in and listen to voicemails, because I can call clients back in two minutes instead of a few hours later. People have questions, and they need answers right away, or they will go somewhere else.”

Inside the office, the Cisco solution makes it easy for employees to set up phone and web conferences with clients, colleagues, and business partners. The Cisco Unified IP Conference Station lets EPILI save time and money on travel expenses, while building a more collaborative company.

“With our Cisco conference phone, the quality is unbelievable, and people don’t need to yell to be heard,” says Fincham. “In the past, we would have to schedule meeting with an accountant or business partner, and drive to their office. Now everybody is getting on the WebEx bandwagon. We can participate in a meeting or attend continuing education class, without having to spend two hours out of our day to get there and get back.”

## **Solution**

EPILI uses a Cisco Unified Communications 560 Series for Small Business to power all of its voice and data communications with one affordable network device. To design, set up, and support its solution, EPILI worked with Clearcable Networks, a Cisco Partner that specializes in advanced IP and voice network systems.

EPILI wanted a phone system that would complement its business processes, rather than forcing the company to change the way it does business. Clearcable was able to tailor the Cisco solution to provide a customer experience that was fast and efficient, yet also personal.

“My father likes to have a live person answer the phone, so we have integrated his style with the new solution,” says Fincham. “We worked closely with Clearcable to configure the system so that an automated attendant picks up the phone if the receptionist cannot answer a call in time. Callers also have the option to dial an extension to reach an employee directly.”

The single-number reach function on the Cisco Unified Communications 560 lets employees consolidate all their incoming business calls into a single business phone number and receive them wherever they are working, so callers reach the right person the first time.

“It’s great that clients can get through to employees so fast,” says Fincham. “People shouldn’t have to beg to purchase life insurance, and this system makes it easy for us to take the call, answer any questions they may have, and conclude the sale.”

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– Matthew Fincham, Consultant, Executive Planning International Life Insurance

The all-in-one Cisco solution also delivers Internet access to everyone at the EPILI office, with built-in firewall protection to help safeguard the company’s network.

“Security is absolutely important to us, because we have a lot of very sensitive data, including personal information about clients,” says Fincham. “The Cisco solution helps us keep everything very secure, and we have redundant systems and backup in place as well.”

For physical security inside the office, EPILI added Cisco Small Business Video Surveillance Cameras. Easy to set up and install, the cameras connect smoothly to the Cisco Unified Communications 560 wireless network, providing peace of mind when the office is closed.

“If our Cisco camera detects movement, it automatically sends out an email, which is really nice,” says Fincham. “When we are away from the office, we can login to our VPN and view live, streaming video from the camera.”

To help keep the network running smoothly, Clearcable offers a remote management service that speeds troubleshooting and routine maintenance such as network moves, adds, and changes.

“The system is monitored on a 24x7 basis, and if we need to make a change, we simply send an email or make a phone call,” says Fincham. “It’s great because it’s fast. The other day Clearcable fixed an issue while I was on the phone with them.”

### **Next Steps**

EPILI is a growing company, and plans to expand its offices in the coming months, so scalability was an important consideration for Fincham and his team.

“We bought the office unit next door, and in the next eight months we are planning to expand and hire additional employees,” says Fincham. “The built-in wireless technology makes it easy to grow. We are considering going completely wireless at our new office, adding a Cisco access point and wireless phones.”

The Cisco Unified Communications 560 was designed to be flexible to support changing business needs, and will provide EPILI with plenty of room for growth in the years ahead.

### **For More Information**

To learn more about the Cisco solution, visit [www.cisco.com/smallbusiness](http://www.cisco.com/smallbusiness) or contact your authorized Cisco salesperson.



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