

BANK ON IT

CISCO IP TELEPHONY PROVIDES PLAN B WITH A COST-EFFECTIVE, SCALABLE COMMUNICATIONS SOLUTION FOR GROWTH.



HEADQUARTERED IN PERTH, PLAN B FINANCIAL SERVICES LTD HOLDS AN AUSTRALIAN FINANCIAL SERVICES LICENCE AND IS A PRINCIPAL MEMBER OF THE INVESTMENTS & FINANCIAL SERVICES ASSOCIATION OF AUSTRALIA (IFSA), THE ASSOCIATION OF SUPERANNUATION FUNDS OF AUSTRALIA (AFSA) AND THE FINANCIAL PLANNING ASSOCIATION OF AUSTRALIA (FPA).

It is one of the fastest growing financial services companies in Australia, and is recognised for its forward thinking.

BankWest, Western Australia's largest retail bank, has a 50% shareholding in Plan B. Plan B offers a full range of wealth management and financial services including superannuation, managed investments, wills and estate planning, deceased estates and trust

administration, business continuity planning, and personal and business insurance. Plan B has over 20,000 clients and more than 170 staff located at offices in Perth, Sydney, Melbourne and at branches of BankWest all over Western Australia. In all, Plan B manages client funds worth well over A\$850 million and has Assets under Advice of over A\$1 billion.

THE CHALLENGE

PLAN B HAS GROWN RAPIDLY SINCE EARLY 1999 AND CURRENTLY HAS TWO SEPARATE OFFICES IN CENTRAL PERTH AND STAFF LOCATED AT BRANCHES OF BANKWEST ALL OVER WESTERN AUSTRALIA AND IN OFFICES IN SYDNEY AND MELBOURNE.

By 2001 this, and the inevitability of future rapid growth, was creating a challenge for Bernardine Dove, IT Manager. An immediate issue was that although both Perth CBD offices were connected via a fibre optic cable for data sharing, each maintained a separate telephone system making inter-office calls inconvenient and a significant expense.

In addition, only a limited number of staff had access to voicemail. So, as well as requiring a new solution that would integrate the Perth offices into a single voice and data system, Bernardine wanted all staff to benefit from the convenience of voicemail with unified messaging integrated with Microsoft® Outlook.

Plan B was also looking to improve customer relations by upgrading their call centre with a telephone system

that would integrate with their Contact Relationship Management (CRM) System to provide instant access to caller details.

As a thriving company, Plan B had also just opened new offices in Sydney and Melbourne and the company has a 'global' vision. Therefore, Bernardine realised that any new system installed in Perth needed to be scalable to allow easy integration with other offices located around Australia and eventually anywhere in the world.

After researching all the options, she found that the Cisco AVVID (Architecture for Voice, Video and Integrated Data) converged network, offered the most cost-effective and scalable solution.

THIS IS THE POWER OF THE NETWORK. now.



THE SOLUTION

IN AUGUST 2001 A NEW CISCO INTEGRATED NETWORK WAS INSTALLED BY A CISCO CERTIFIED PARTNER.

The solution features a Cisco CallManager server located at Plan B's Central Park office with a range of Cisco 7960, 7940 and 7910 handsets in both Perth offices. The connection between the two sites is via the existing fibre Gigabit link with an 11Mb wireless connection as a redundant voice link.

Plan B installed a Cisco 3460 router in the Central Park office to provide a LAN connection and Voice Gateway to the local PSTN. This router also supports thirty digital modems, which provide dial-in access for mobile and remote staff located at the BankWest branches.

Also installed was a Cisco Catalyst 4006 switch with in-line power to provide a high performance backbone for data and to supply in-line power to the IP handsets.

A Cisco Catalyst 4224 Access Gateway Switch was installed as a backup for the Cisco Catalyst 4006 switch. The Catalyst 4224 was supplied with SRST software (Survivable Remote Site Telephony). This feature allows the Cisco Catalyst 4224 Access Gateway Switch to pass calls to the PSTN from the IP handsets on the LAN, should communication with the CallManager server become unavailable. The Catalyst 4224 Access Gateway Switch will also provide in-line power to the IP handsets within the office so that external power adapters are not required.

A core requirement for Plan B was for Unified Messaging, a Call Centre, Operator Consoles and CTI integration. For this component, Performance Solutions Vision Telephony Server was selected.

The Call Centre at Plan B has agents who answer Customer Support, Valued Client and Special Events queries. The Call Centre software features advanced call routing, with multiple

agents and skill levels, customer priority and drag and drop call control. There are queue announcements and IVR options that permit customers to leave voicemail messages rather than wait in a queue. The system has historic and real-time reports and GUI Management.

A PC-based console enables consoles to be located anywhere in the network, rather than being tied to a physical console, as would be the case with a traditional PABX. The console supports queuing of calls with the same features as the Call Centre and has a real-time status display of all extensions.

Unified messaging allows users to have their voice messages delivered to their Microsoft® Outlook inbox. This saves the need for users to check multiple applications.

The Vision Unified Messaging module is fully integrated into Microsoft Outlook 2000 and features schedule integration with locations, automatic phone forwarding and release, live directory showing phone states, locations and return times, one touch dialling or directed pickup. It also has the ability to record conversations, to watch and control the Call Centre, contact creation from caller line ID, call logging and one touch recall of missed calls, answered calls and outbound calls.

An important part of Plan B's business revolves around their CRM application, which has been modified and enhanced to support TAPI. Plan B staff can dial client telephone numbers by a simple click from the CRM application. The TAPI enhancement also enables the system to automatically show customer details when a client calls in.

THE RESULT

WITH THE NEW SYSTEM IN PLACE PLAN B HAS SEEN MANY BENEFITS. ONE IS AN IMMEDIATE REDUCTION IN CALL COSTS.

"Under the old PABX system, we were being charged for approximately 1500 calls per week that staff made between the two Perth offices. Now these calls are effectively free," said Bernardine.

"The cost of cabling one of the offices was halved as we only had to install one cable instead of two, and staff relocations have become far easier and cheaper. Now employees can pick up their phone, take it with them to the other building, plug it in and continue business as usual with exactly the same number. And all this can be conveniently managed by Plan B in-house.

"Under the old PABX system, we sometimes had to wait up to a week for a phone change to be made which was a major interruption to business, and we paid for a service call each time. Our old PABX had reached capacity so we couldn't add more phones and no one could take their numbers with them. With IP telephony, the system is scalable; there is no limit to the number of people we can add. If we want to add our branches onto the system all we have to do is install a router at the branch and they will be connected to the office."

The Call Centre has also been a success. Plan B have between five and seven staff working there, responding to client enquiries. One of the key issues that they needed to know was how long these important callers were waiting and how many calls we lost. Under the old system they had no idea. Now they can instantly see who is on the line, how long they have been waiting and analyse these statistics to measure performance in customer service.

Another key improvement has been in how calls are handled. With integration into Outlook using the Vision Telephony Server from Performance Solutions, call centre staff can instantly see the status of all other employees. Small graphic icons appear beside each name revealing at a glance if they are sick, in a meeting, away from the office etc. so that operators can connect or advise callers appropriately.

Bernardine comments: "Staff particularly like the fact that when using Cisco 7940 or 7960 handsets they can type someone's name into the system, double click and then call them hands-free!"

"UNDER THE OLD PABX SYSTEM, WE WERE BEING CHARGED FOR APPROXIMATELY 1,500 CALLS PER WEEK THAT STAFF MADE BETWEEN THE TWO PERTH OFFICES. NOW THESE CALLS ARE EFFECTIVELY FREE,"

BERNARDINE DOVE, IT MANAGER, PLAN B FINANCIAL SERVICES LTD

"We are also happy with the way the Cisco solution integrates with our existing CRM system. Even though PABX systems could do this, all of their solutions required us to maintain an additional, separate database for this purpose. Given that we already maintain eleven databases, we didn't want to manage yet another identical database of this system, so this made the Cisco option far more attractive. We do however, have to maintain the internal telephone numbers on two separate systems provided by Cisco and Performance solutions."



THE PARTNERSHIPS

ANY CONVERGED NETWORK SOLUTION REQUIRES A CLEAR IMPLEMENTATION STRATEGY AND STRONG, RELIABLE PARTNERSHIPS. PLAN B WAS ABLE TO RELY ON A CISCO SPECIALISED PARTNER, WITH A HISTORY OF SUCCESSFUL ROLLOUTS.

As a result, their implementation has successfully met the organisation's technology goals.

"With the new infrastructure in place, we now have a scalable system that will enable cost-effective, sustainable and manageable growth," said Bernardine.

"Cisco and their partners provided us with excellent service. Ours was the largest IP telephony solution to date in Perth and it was not without its unique challenges. However, the team were on hand whenever we needed them and they went out of their way to solve any issues quickly and effectively."



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