

Financial Firm Links Offices With Hosted VoIP

SINCE 1957, DAVID'S FINANCIAL, the parent company of David's Check Cashing, has helped customers from all walks of life access cash, pay bills to vendors such as Verizon and ConEdison, obtain money orders and perform money transfers. The company further sells prepaid phone cards, and offers ATM and coin counting services in its 26 neighborhood stores throughout the New York City area. But it doesn't just serve individuals — David's also works with Fortune 500 organizations. For example, David's supplies corporate tellers, on-site payroll distribution and armored car services.

The Challenge. David's Financial aims to be the "best-in-class" financial services company in its region and its communications platforms were hindering that goal. None of the phone systems tied together — David's used an aging phone system at its headquarters and mixed brands of phone lines and equipment at its branch locations. Everything was independent. To top it off, Ira Krell, CFO of David's Financial, spent hours every month trying to reconcile the bills from the various phone service providers.

The Solution. Krell called his channel partner, Feliks Kiliski of Glacier Communications Inc., a New York City-based telecom consultancy. Krell said it was time for David's Financial to find a new communications system. Glacier works with a number of different carriers, including Bell operators and competitive service providers, and prides itself on creating tailored solutions for its customers. So, Kiliski showed Krell two different ways David's Financial could address its business communications problems.

The first option was to install and manage small, on-site phone systems in each branch. Such an approach would have required an upfront investment of more than \$100,000 for new equipment, project management resources and ongoing system maintenance. Glacier also would have needed to install additional circuits to tie together all of David's sites.

The second option was a cloud-based, hosted phone platform. In this scenario, data servers and other back-end phone equipment all are stored off-site. The only gear David's would have to keep in its offices and headquarters would be the desktop phones. Not only would David's save a significant amount of money on equipment and access lines with this method, but each of its 26 locations would get out-of-the-box functionality.

A cloud solution made the most sense, so Kiliski's next step was to recommend the platform that best met the needs of David's Financial. Kiliski thought Broadview Networks' OfficeSuite cloud product was the ideal fit.

The Result. OfficeSuite, like other cloud platforms, frees users to focus on operations rather than worry about communications. That means Broadview performs system upgrades and routine maintenance, and also oversees security and networking. David's Financial, meanwhile, would benefit from VoIP calling routed over private MPLS networks. This ensures voice quality, allows Broadview to provide service level agreements and saves David's Financial a bundle in calling costs. When it comes to features, OfficeSuite boasts more than 40, including hot desking for mobile employees; click-to-dial with a Microsoft Outlook plug-in; voice mail from any phone, over the Web or email; and auto attendant for inbound callers. Compatible phones include standard 24-key stations, executive LCD stations, conferencing modules, softphones and more.

Thus, Kiliski and Krell chose OfficeSuite for David's Financial because it not only offered the core features they needed within each office but it also offered a way to make the branches part of the larger system — functionality the company couldn't afford with individual on-site systems.

Now, David's Financial employees can call colleagues with simple extension dialing. They also take advantage of the softphone resource, which Krell added for

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— David's Financial's Ira Krell

remote workers. A user launches the softphone client from any Internet-connected PC, and their computer becomes an extension of the OfficeSuite phone system, able to make and receive calls as if it were any other station on the system.

Plus, the system is scalable, so David's Financial doesn't have to fret about its communications capabilities when it adds locations. Best of all, the whole platform can be managed and maintained from an online portal, further reducing ongoing expenses.

Above all, Krell said OfficeSuite has enabled David's Financial to achieve its "best-in-class" goals.

"During our busy time, we have reduced the number of phone calls our tellers have to field by about 40 percent," Krell said. "It has allowed us to better communicate with our customers and create a system where our customers experience David's Check Cashing and its related companies in a more positive way. It's been a win-win for us from the get-go." CP

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