

Directly Financial

A CTI and IP Solution



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Owen Miles, Systems Manager,
Directly Financial

When most of your business is telephone based you need a reliable telephone system which can handle high call traffic and detailed reporting as well as be forward and backward compatible with any of your existing technology.

This case study details how Directly Financial implemented its telecommunications requirement and discovered that a fully integrated IP solution was the only way to go.

CUSTOMER BACKGROUND

Directly Financial are acknowledged nationally as experts in converting pension funds into income. Annuity Direct is the trading name for Directly Financial.

Since its inception in 1993 Annuity Direct has assisted in excess of 45,000 individuals in assessing opportunities for pension income. It also provides advice and information to trustees, investment companies and life offices on pension income, product development and annuities.

Long-term clients include Leeds and Halifax and Marks & Spencer Financial Services.

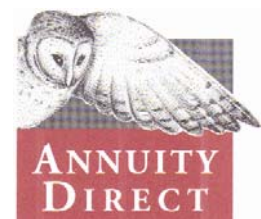
Directly Financial is a forward thinking organisation and it is continually looking to enhance and evolve the technical side of its telecommunications.

THE BUSINESS CHALLENGE

Competing with quite a large number of other financial advisors around the country means that Directly Financial always needs to be on-the-ball when it comes to using technology to its advantage.

As the company developed Directly Financial saw the need to be able to link its phones to a database and add the functionality of recording calls at any given time. The ability to make changes to telephone system without having to call out an engineer was also a priority.

Also in an effort to streamline the business Directly Financial were looking for way to enable its staff to work at home whilst considering those working from remote sites.



WHY INTER-TEL?

By working with one of Inter-Tel Europe's leading resellers, Directly Financial were delivered a complete technical solution incorporating all their requirements, plus a few extra.

The flexibility of the Inter-Tel Axxess platform meant that the reseller was able to do onsite programming with little training which mean an important cost saving for Directly Financial.

The Open Architecture Interface of the Axxess platform allowed full and seamless integration with third party software vendors. Additionally, the Axxess itself delivered the fundamental requirements of Unified Messaging, Fax Server functionality and Voice over IP.

THE BUSINESS SOLUTION

"Choosing a solution which met our current requirement but also catered for future, and potentially rapid, growth was important to us" commented Owen Miles, Systems Manager, Directly Financial. *"The Axxess platform was the best solution on offer. Not just for its powerful Voice over IP solution enabling us to successfully connect to our remote agents but also the many other opportunities it offers, such as, Unified Messaging and Voicemail and Computer Telephony Integration."*

RESULTS

Since its implementation Directly Financial has been able to monitor calls with much greater accuracy.

"Our dedicated team of 20 plus people uses the Inter-Tel telephone system - including two remote site workers who use the integrated Voice Over IP functionality - to make and receive on average 800 calls per day, although the system has coped admirably with our peak periods, reaching levels of 1500 calls. Since moving to the Inter-Tel system the total number of calls we have made and received has exceeded 500,000, averaging some 32,000 calls per month" Miles concluded.



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