PACIFIC CITY BANK
CASE STUDY

Unified communications helps community
bank focus on personalized service

MITEL
Simply Communicating®

COMPANY

Pacific City Bank, a commercial bank with seven branches, headquartered in the city of Los Angeles, California.

CHALLENGE

Simplify and integrate communications to help staff in multiple branches offer personalized and prompt financial services to customers.

SOLUTION

- Mitel Unified Communicator® (UC) Advanced
- Mitel Dynamic Extension
- Mitel Communications Director (MCD 4.0)
- Mitel IP Sets (Mitel 5330 IP Phone, Mitel 5340 IP Phone)

RESULTS

- Integrated voice and data communications
- Operational savings
- Seamless access to all employees on any device
- A single access point for better control
- Simplified, real-time communication and collaboration

Fast, personalized service requires a high-level of staff availability and coordination. This level of service is what Pacific City Bank, a boutique commercial bank with seven branches in Los Angeles, California, had in mind when it made the switch to VoIP and unified communications.

A community-based bank with ties to local businesses, Pacific City Bank offersa mix of business and personal accounts, emphasizing Internet and mobile banking. But despite the online focus, the bank's strategy considers live telephone communication with customers to be mission critical. In contrast with larger banks that route calls to auto attendants, all calls to Pacific City are personally routed by receptionists to the appropriate staff member for assistance.

The idea that friendly, professional interactions build lasting relationships brought Pacific City to consider the communication benefits offered by merging data and phone service onto one network. To unify, streamline, and centralize communications, they seamlessly upgraded to Voice over IP and UC Advanced on an in-house Mitel® system.

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> — Jay Park, Management Information Systems Supervisor, Pacific City Bank

Going VoIP

Since its founding in 2003, the bank's initial phone system used a digital Mitel PBX hosted by TelePacific Communications. For the upgrade, it decided on a joint Mitel-TelePacific installation of Mitel Communications Director call-control software running on a Mitel 3300 IP Communications Platform (ICP) with TelePacific T1 service.

Jay Park, Management Information Systems Supervisor at Pacific City Bank, thinks the upgrade, complete with "excellent service" from Mitel, has benefited the company in a number of ways.

- **First contact resolution for better customer service.** Integrated unified communication functionality is helping both customers and employees reach the right person more quickly. Resolving customer issues and answering inquiries on the first call saves resources by avoiding service tickets and follow-up.

- **Reduced cost.** "Mitel Dynamic Extension reduces the per-minute cost of cell phone calls when routed back through our corporate network, so we're saving money every minute," says Park.

- **Better support to employees.** Because its communication system is in-house, the bank has more control and can avoid the two- to seven-day support ticket delay typical to a hosted solution. Network administrators have the flexibility to perform rapid moves and changes, add new phones and reset passwords.

- **In-house disaster recovery.** In Los Angeles, networks go down. Quick resolution is critical when telephone communication is top priority. Since the bank moved business continuance in-house, when a branch experiences an outage, network administrators can quickly start routing calls through headquarters, and vice versa. In a disaster recovery scenario, employees can also work from home on any phone. Through Mitel Dynamic Extension, they still have all the features and functionality of the Mitel IP solution.

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that adds up."

— Jay Park, Management Information Systems Supervisor,
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Unified communication
maximizes benefits of VoIP

After one demo of UC Advanced, officials could see how this desktop application that integrates communications tools and enhances real-time collaboration could support a bank that focuses on specialized customer interaction and rapid decision-making.

Pacific City has rolled out UC Advanced to a group of pioneers. According to Jay Park, this group is already benefiting from rapid access to co-workers and from the simple ways of managing personal communications. "We are early in our implementation, but UC Advanced is already making our everyday communication more productive. The features we like are almost too numerous to list."

Employee presence and availability is a big one. For Park, "seeing co-workers on the network, in the office or off-site, and knowing how to reach them at that moment—by phone, chat, IM, cell or another device—makes it very likely that we will connect directly, avoiding messages and tag."

Other features are enhancing interaction at the bank, including the ability to:

• initiate secure chat, web and desktop video collaboration sessions in a click

• launch contact information from caller ID screen-pops before even answering the phone

• integrate PC applications with a single access point for all communications and collaboration

"When each of our 110 employees can perform day-to-day activities a bit easier, a bit faster—that adds up," says Park.

Dynamic Extension

With anywhere from 25 to 30 percent of staff on the road at remote sites or visiting branches, the integration of UC Advanced with Mitel Dynamic Extension means that employees can be reached on one corporate phone number through any device. Through Dynamic Extension, you can associate within a personal ring group up to eight devices that are not necessarily part of the corporate network.

For Jay Park, this feature allows him to seamlessly move around between branches without missing any calls or texts. "When I come into the office, I can easily pass my cell phone calls onto my desk phone, which reduces airtime charges. Another feature we really like is being able to transfer calls to anyone on any device."

Instant messaging

IM is an important form of collaboration among employees, but Pacific City was not willing to compromise security on external chat services. Because UC Advanced instant messaging (IM) and file sharing offer security not typically found in IM services—including a secure and encrypted IM history log—it has become a key component of internal communications.

Jay Park points out that many employees prefer chat to phone calls. "IM is one of the best used features of the new system. We can chat with one person or many with a mouse click. Some of us even multitask, with a phone call and a chat session going at the same time."

"We can also drag and drop a file for sharing into a chat session. This way everyone can look at the file at the same time in a secure environment, helping us work together to share ideas and solve problems. And we have a record of the file and when was shared."
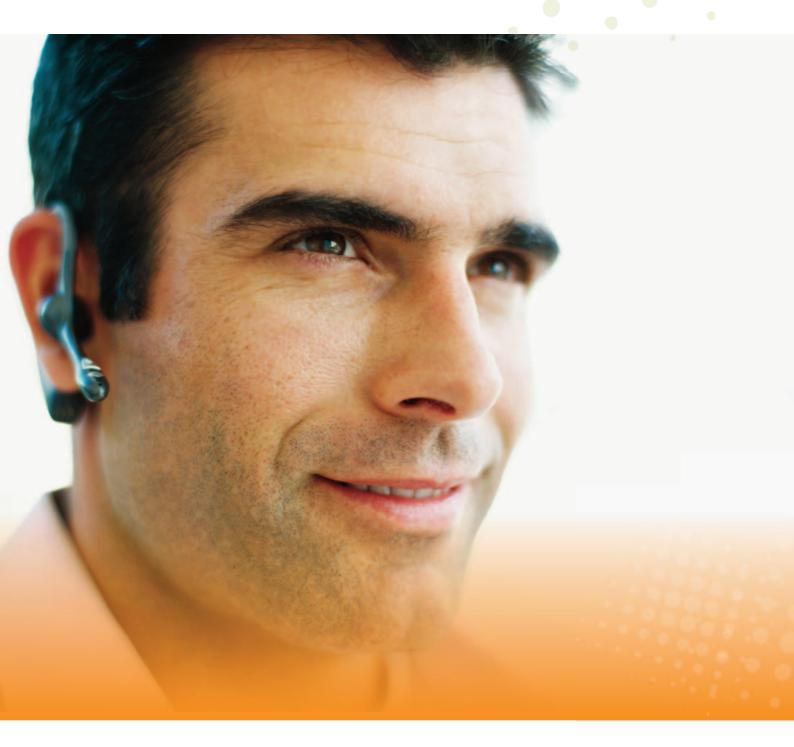
Integration with Microsoft® tools

Pacific City users have imported Microsoft Outlook® contacts into UC Advanced, where they can manage and use them for communication. They love the idea of calendar integration, a new feature of UC Advanced 3.0 that changes your status on the basis of your calendar. Within this, you can control routing: when you're in a meeting, for example, you may route calls to voice mail or allow a certain caller to ring your cell phone. This intelligent call routing capability ensures that select individuals can reach you at a moment's notice.

Visual Voice Mail

When customer calls cannot be routed to a live person, they go to voice mail provided by Mitel NuPoint Unified Messaging™ (UM) and integrated with UC Advanced Visual Voice Mail. "We really like our voice mail system," says Park. "Now that it's integrated with UC Advanced, it's better because all voice mails are actually stored on my phone and not on my cell phone voice mail."

UC Advanced 3.0 provides Visual Voice Mail within the client that will let bank employees see, play, reply to and manage voice mails on their desktop. They will also be able to immediately see the best way to contact the sender at the moment. All of this functionality is available from the core UC Advanced solution.

UC Advanced Console

PC-based UC Advanced Console offers more sophisticated and intuitive routing features than desk phones, helping a service-oriented community bank increase customer service levels by personally ensuring calls are routed to the right person.

Busy receptionists can process calls more efficiently by dragging and dropping them to the desired destination based on the presence information displayed. When the appropriate employee is not available through any means, calls can be sent to a colleague or to voice mail. And the console allows receptionists at Pacific City to use their deskphone and PC when they need to complete other duties outside of answering phones.

Customer Service 3.0

At this stage of the implementation, UC Advanced has already made internal and external communications easier and more straightforward. Bringing communications tools together in a secure and centralized system is helping the bank provide better customer service.

Says Park, "Caller self-routing, Dynamic Extension, Visual Voice Mail: these are just some of the functions in UC Advanced that are making us more productive, day by day."

www.paccitybank.net

www.mitel.com

MITEL®

Global Headquarters	U.S.	EMEA	CALA	Asia Pacific
Tel: +1(613) 592-2122	Tel: +1(480) 961-9000	Tel: +44(0)1291-430000	Tel: +1(613) 592-2122	Tel: +852 2508 9780
Fax: +1(613) 592-4784	Fax: +1(480) 961-1370	Fax: +44(0)1291-430400	Fax: +1(613) 592-7825	Fax: +852 2508 9232

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