

## TRIDENT HOUSING+SHORETEL

### ShoreTel integrates Trident Housing's CRM system and improves customer service



#### Upgrade in the works

After upgrading its IP-ready network, Trident was looking to improve customer service through integration of its telephony system with its customer relationship management (CRM) system.

#### All in one UC communications with an integrated call centre

Trident has an almost 50-year tradition of delivering homes, services, and innovation to 6,000 people in 3,100 homes in some of the most disadvantaged communities in the Midlands.

Communications is absolutely critical to Trident as the organisation generates the majority of its

revenue over the phone. Trident typically records 1,600 calls per week, the majority being repair requests, followed by new customer enquiries.

After a recent network upgrade, Trident wanted to improve access to customer information through a revamped CRM system. By integrating this system with a new telephony system, Trident planned to deliver new levels of personalisation and convenience, while improving the customer experience.

Specifically, Trident was looking for a telephony system that would meet the following criteria:

- Integration capabilities with Microsoft CRM at all levels

#### Challenges:

After upgrading its IP-ready network, Trident wanted to add customised call management and reporting, supported by a scalable and reliable infrastructure, as key requirements.

#### ShoreTel Solution:

ShoreTel provided a Unified Communications (UC) system that included 150 ShoreTel IP Phones, ShoreTel Enterprise Contact Centre and ShoreTel Converged Conferencing solutions.

#### ShoreTel Benefits:

- Increased efficiency of customer advisors
- Monitoring and call reporting
- More accurate call handling
- Better reliability and scalability

- Ability to set up on-screen dialling and screen-popping on incoming calls that are transferred from the head office
- Call reporting and monitoring functionality
- Ability for unified messaging
- Single corporate directory
- Routing to the next available person within a hunt group

ShoreTel captured Trident's requirements to the highest level compared to competitive solutions, including one offered by Mitel, Trident's incumbent vendor. ShoreTel also offered an all-in-one solution for UC communications with a fully integrated contact centre.

"We were very impressed with the ShoreTel system demonstration, which also was attended by our employees and customers. The ShoreTel team displayed extraordinary willingness to help, and enthusiasm for understanding all our requirements, which was also important to us," explains Edward Reed, head of IT for Trident Housing Association.

### **CRM integration improves customer satisfaction**

Integration with the Microsoft CRM system was an essential requirement for the implementation at Trident. Data on the inbound caller now "pops" onto the Trident business user's screen, a technology known as caller line identification (CLI). Screen pops provide instant access to customer data, and integration of this data with the ShoreTel system was specifically tailored to the needs of Trident by configuring it to recognise mobile numbers. As a result, the time taken per call (screen popping and enhanced call routing) has decreased, which has increased the efficiency of customer advisors and improved customer satisfaction. A recent customer satisfaction survey has shown that the perceived customer service level has increased and that callers are connected to the appropriate advisor quicker and have their requests processed faster.

---

**"THE SHORETEL TEAM DISPLAYED EXTRAORDINARY WILLINGNESS TO HELP, AND ENTHUSIASM FOR UNDERSTANDING ALL OUR REQUIREMENTS, WHICH WAS ALSO IMPORTANT TO US."**

Edward Reed, Head of IT  
Trident Housing Association

### **Enhanced call management, recording, and reporting**

"ShoreTel Call Manager enables staff to track messages more easily, again contributing to shorter response time and improved customer service. Managers can listen in live to phone calls and monitor user performance, which they were unable to do with the previous system," says Reed. "Agents and groups in the call centre are monitored through reporting tools which can be customised and automated. With the help of ShoreTel, reporting has become easier to administer and manage. Calls are now transferred appropriately from the head office, enabling more efficient account management."

Trident employees were all introduced to the new system via on-site training or videoconference training sessions. "Our employees like the new system. The ShoreTel Call Manager package offers numerous functionalities; it is also very easy to use and has an intuitive interface," says Reed. "For the first time in our history, we now have a single corporate directory on handsets, instead of sensitive personal data lying around on paper, which was the case before."

The ShoreTel system is a completely distributed solution layered on the IP network with no single point of failure, which makes the system very reliable and scalable, and offers great business value. The ShoreTel distributed architecture also enables staff to centrally manage the system. Switchboard operators can solve many issues independently without external support, lowering the systems' total cost of ownership over time and enabling rapid response to change requests.

### Trident is at home with ShoreTel

"We are very happy with the ShoreTel telephony system at Trident. It is a top system and our chosen platform for the future. We plan to add new functionalities and continuously improve and fine-tune the system to meet emerging customer needs," concludes Reed.

---

"WE ARE VERY HAPPY WITH THE SHORETEL TELEPHONY SYSTEM AT TRIDENT. IT IS A TOP SYSTEM AND OUR CHOSEN PLATFORM FOR THE FUTURE. WE PLAN TO ADD NEW FUNCTIONALITIES AND CONTINUOUSLY IMPROVE AND FINE-TUNE THE SYSTEM TO MEET EMERGING CUSTOMER NEEDS."

---

### About Incom Business Systems

Incom Business Systems designs award-winning business communications solutions that enable people to collaborate and work more effectively, while reducing operational costs and capital expenditure. Our expertise in voice and data convergence and contact centre technologies enables us to address the evolving requirements of SMEs, enterprises, Not for Profit and government organisations. For more information, visit [incomtele.com](http://incomtele.com)

Tel: +44 (0)161 788 0000

---

### ShoreTel. Brilliantly simple business communications.

ShoreTel, Inc. (NASDAQ: SHOR) is a leading provider of brilliantly simple IP phone systems and unified communications solutions powering today's always-on workforce. Its flexible communications solutions for on-premises, cloud and hybrid environments eliminate complexity, reduce costs and improve productivity.

