



**Industry:** Insurance

**Installation:** 9 locations, 32 ShoreGear voice switches, 460+ ShorePhone IP telephones

**Date of Install:** June 2005 – June 2006



## Challenge:

Safeway Insurance Group needed to replace an aging PBX-based analog telephone system. The company decided it was time to converge voice and data and looked into IP telephony solutions.

## Solution:

Safeway Insurance Group chose ShoreTel for a comprehensive solution to span its nine locations, including ShoreGear voice switches, voice mail servers, and ShorePhone IP telephones.

## Benefits:

- Failover capabilities of ShoreTel's distributed architecture solution allow the company to always serve its customers, even during an emergency like Hurricane Katrina.
- Communications are enhanced internally and externally with the rich feature set of the ShoreTel IP telephony system, boosting customer satisfaction and employee productivity.
- Management of the ShoreTel IP telephony system is simple and straightforward, allowing Safeway Insurance Group to manage the system from in-house, which saves time and money.

## SHORETEL DELIVERS ON CLAIMS AND ENHANCES BUSINESS FOR LEADING INSURANCE GROUP

### Safeway Insurance Group Deploys ShoreTel and Sees Immediate Savings and Customer Satisfaction and Employee Productivity Gains

For 40 years, the Safeway Insurance Group Insurance Group has provided automobile insurance to drivers in various states across the country. The organization is based in Westmont, Illinois, located in suburban Chicago, and maintains field offices in the states it serves. Founded in 1962, offering insurance coverage in the greater Chicago metro area, the company has expanded and today operates seven insurance companies within the Group and offers insurance coverage in nine states, including Alabama, Arizona, California, Florida, Georgia, Illinois, Louisiana, Mississippi and Texas.

In 2005, Safeway Insurance Group was using a PBX-based analog telephone system. With the company's rapid growth, Safeway Insurance Group would have needed to do a major system upgrade to meet its needs. Donna Jonynas, vice president and Chief Information Officer, and Mike Leather, Network Services Manager for Safeway Insurance Group, wanted to look into a system that would integrate voice and data and take advantage of the many benefits of Voice over IP (VoIP), so he issued a Request for Proposal (RFP) to IP telephony vendors. The initial process narrowed the choice for the organization down to ShoreTel® and Cisco. After doing extensive research on both of these companies, seeing demonstrations, and talking to customer references, Safeway Insurance Group chose ShoreTel. The company's reasons, according to Leather, came down to ease of use, the ability to manage the system from in-house and integrated features.

"Even though we're a Cisco shop, for IP telephony, ShoreTel was easy to use and manage, and it had a better interface," said Leather. "Also, ShoreTel gave us the ability to do moves, adds, and changes ourselves. Cisco's solution did not seem as elegant as ShoreTel's, nor was it as integrated. The applications we were looking for required different software to be added to the system, whereas all the features we needed were already included in the ShoreTel system."

With the help of its integration partner, ShoreTel provided Safeway Insurance Group with two voice mail servers, 14 ShoreGear® T1 switches (one for each of its sites), and 12 ShoreGear 40, 2 ShoreGear 60, and 4 ShoreGear 120 voice switches, also deployed throughout all of its offices. The company is also using ShorePhone™ IP telephones, more than 460 of them, including models 530 and 560.

Before the deployment, Safeway Insurance Group conducted a network assessment with the help of ShoreTel and implemented some changes to improve performance before the IP telephony system was deployed. "Support services, from evaluation to deployment, were an important factor, and ShoreTel's been there every step of the way," said Jonynas.



“The support we’ve received from ShoreTel, right from the beginning, has been excellent,” said Leather.

### **ENSURING EASE OF USE AND RELIABILITY**

ShoreTel IP telephony systems are easy to use, simple to manage, flexible, and reliable. With the ShoreTel system in place, all Safeway Insurance Group employees are now on the same phone and voice mail system, using 4-digit dialing to reach colleagues in any location and even dialing co-workers by name. ShoreWare® Personal Call Manager improves day-to-day productivity by enhancing internal and external communications.

Safeway Insurance Group had an easy time training its users on the ShoreTel IP telephony system because the system is so easy to use. “As for learning the management, that was easy,” said Leather. “We learned the system during implementation and the entire system has been easy to administer since that very first day.”

In addition to an easy transition from the old system to the new, ShoreTel’s call control software is distributed to every voice switch, which eliminates any single point of failure in the system. In the unlikely event of a ShoreGear voice switch failure, other switches on the network will automatically take on the call-processing load so no call into Safeway Insurance Group is ever dropped.

“The failover of the ShoreTel system has already been a great benefit,” said Jonynas. “We encountered a unique situation when deploying the ShoreTel system—Hurricane Katrina hit Mississippi and Louisiana. Because of ShoreTel, it was easy to shift the phone service to the other offices. Calls were automatically routed to other offices and we could still service customers in Mississippi and Louisiana.”

“IT appreciates knowing that if an office cannot access the network, then calls can be re-routed to ensure business continuity,” said Leather. “This is helpful in the case of weather conditions, as with the hurricane, and with other telecommunications issues. Everything is seamless to users in any area—calls get through no matter what.”

### **REAPING EMPLOYEE AND IT PRODUCTIVITY GAINS**

The ShoreTel IP telephony system provides employees with integrated messaging, such as directory dialing, contact screen pop, and calendar integration. ShoreWare Personal Call Manager enables employees to manage all of their communications—voice mail, e-mail, faxes—centrally on their desktop. With it, employees can quickly browse contacts and make calls from local directories, making hardcopy directories—which are often out of date anyway—obsolete.

Personal Call Manager’s friendly, graphical interface provides easy access to sophisticated features, including on-the-fly conferencing and document sharing. Voice mail messages are stored in the industry-standard WAV Audio for Windows format, allowing users to play them on multimedia PCs, attach them to e-mail messages and forward them to the right people, or embed them in other documents as well as keep permanent records on file. The ability of the ShoreTel system to track customer phone calls and export and distribute voice mails as WAV files helps Safeway Insurance Group continually monitor and improve customer service.

*“The support we’ve received from ShoreTel, right from the beginning, has been excellent.”*

**– Mike Leather**  
Network Services Manager,  
Safeway Insurance Group



*“Some of our offices are small and don’t have a need to have an IT person on-site. The ease of management of the ShoreTel system saves us time and costs associated with traveling to remote offices to address phone issues.”*

**– Mike Leather**  
Network Services Manager,  
Safeway Insurance Group

“I like the fact that you can forward voice mail messages without having to remember keystrokes on a handset system,” said Jonynas. “The Personal Call Manager interface makes this straightforward and simple.”

Safeway Insurance Group is also using ShoreWare SoftPhone, a desktop utility that delivers telephony capabilities to user’s desktop computers. When no telephone is available, with SoftPhone, a Safeway Insurance Group employee’s computer or laptop with a headset plugged into it can deliver all the capabilities of their desktop extension, raising the bar on mobile productivity.

“Users really like Personal Call Manager, and many of them are using their computers now instead of the actual phone set to efficiently manage their calls,” said Leather. “SoftPhone is used by some of the employees who work from home, which allows them to avoid using their home lines and also keeps our long-distance charges down because their calls go through the ShoreTel system.”

ShoreWare Director is ShoreTel’s browser-based management interface. From anywhere on the network, an administrator can launch a Web browser and gain access to ShoreWare Director. Through this browser, every site and feature can be managed, including voice mail, automated attendant and desktop applications. Adding a new user simply entails clicking “add new” and entering the user’s name, which in turn updates the centralized database and notifies every voice switch. Once the user is entered, a mailbox is created, the automated attendant dial-by-name and number feature is updated, and online directories are updated—all within seconds, and changes are just as quick and easy.

“I like the ability to maintain and support the ShoreTel system so easily, even remotely,” said Leather. “Some of our offices are small and don’t have a need to have an IT person on-site. The ease of management of the ShoreTel system saves us time and costs associated with traveling to remote offices to address phone issues.”

## **CONTINUALLY IMPROVING CUSTOMER SATISFACTION**

Safeway Insurance Group is utilizing ShoreTel’s Workgroup capability, which enables the company to consolidate specific inquiry calls to one number, and calls are routed to the next available staff member. The organization has specific workgroups dedicated to such departments as customer support (in each location), claims and underwriting, technical support and more. Workgroups also provide basic reporting capabilities to help measure call volume and make work schedule changes as necessary.

“Workgroup supervisors like the ability of the agent monitor and queue monitor to obtain agent and queue status,” said Jonynas.

Safeway Insurance Group also utilizes ShoreTel’s hunt group feature to make sure standard phone calls reach a person as well. Hunt groups have multiple call routing options and ensure that live calls are answered by having primary and backup operators. With hunt groups, when a person is busy on the phone or unavailable, calls are routed to another extension or multiple extensions, preventing callers from unnecessarily reaching voice mail. Each one of Safeway Insurance Group’s workgroups has its own backup hunt group to ensure that someone always answers the phones.



“Customers now reach the person they need, without having to hang up and dial another number,” said Jonynas. “Workgroups are centralized and the next available agent can pick up the call, so no caller unnecessarily goes into voice mail.”

Finally, ShoreTel’s Office Anywhere feature allows employees to choose the device they work from – for instance, a cell phone or home phone – and that device assumes the identity and capabilities of his or her regular office extension. For example, the caller-ID information provided when the employee makes a call will reflect their office number instead of the mobile or home-office phone actually being used. Office Anywhere also enables seamless participation in workgroups, hunt groups, and contact centers, and it provides Safeway Insurance Group with a cost-effective method of allowing employees to work remotely when they need to.

In addition to Personal Call Manager, Safeway Insurance Group is also utilizing ShoreWare Operator Call Manager, which provides receptionists with critical information necessary for exceptional customer service. For example, when the phone rings, a call-routing log displays the caller’s entire experience within the system. Before transferring callers, the call-transfer screen displays information about who is available and who is already on the phone. With this detailed level of information, attendants not only connect callers faster than ever, but also give them the highest level of professional service. With the complete company at their fingertips, along with knowledge about who is available and where a caller has already been sent, the receptionist can transfer using a simple drag-and-drop tool to the most appropriate person—to their extension, cell phone or even their home phone.

## ENABLING BETTER BUSINESS

Safeway Insurance Group appreciates the ShoreTel IP telephony system’s ability to record telephone calls, which are especially important for insurance claims. Recordings used to be done with cassette tapes, which took up a lot of space and required physical storage. With the ShoreTel system, the recording is electronic, and that electronic file can be attached to the claim, allowing all of the information to be kept together and stored electronically on a server.

The ShoreTel system is easy to implement and anytime Safeway Insurance Group expands with another branch, it can easily be added to the system. The company is very satisfied with its ShoreTel IP telephony system and the support it’s received from the IP telephony vendor.

“ShoreTel was easy to implement, was easy for our users to learn, and makes moves, adds and changes simple for us,” said Leather. “We no longer have to worry about the phone system when planning for an office move or expansion. ShoreTel definitely delivered on its promise of ease of use and self-administration capabilities.”

“ShoreTel has been more cost-efficient from a management and maintenance standpoint,” said Jonynas. “Overall, the system has been very well-received and we’re happy with our decision to go with ShoreTel.”

*“ShoreTel has been more cost-efficient from a management and maintenance standpoint. Overall, the system has been very well-received and we’re happy with our decision to go with ShoreTel.”*

**– Donna Jonynas**  
VP/CIO,  
Safeway Insurance Group