

Matthews, Gold, Kennedy & Snow, Inc.



Customer

Matthews, Gold, Kennedy & Snow, Inc.

Industry

Financial

Challenges

- Continuous growth
- Remote users
- Multi-state operation
- Aging equipment

Solution

- IP communications platform: NEC UNIVERGE® SV8100
- Unified communications: UC for Business
- NEC Associate: Canyon Telecom (Phoenix, Arizona)

Results

- Cohesion across locations
- Improved employee productivity
- Enhanced process efficiency
- Better client responsiveness
- Reduced paper-based communication

The need for efficient business communication is becoming critical as the workplace takes on a more distributed landscape. Companies can leverage technology to better support a dispersed workforce, manage growth and sustain competitive advantage.

Matthews, Gold, Kennedy & Snow, Inc. (MGKS) is an employee benefits consulting firm that provides recordkeeping, administration and actuarial services for retirement plans. Headquartered in Phoenix, the company has employees in five other states. The company—with the help of authorized NEC dealer Canyon Telecom, Inc.,—implemented an IP communications solution that improved productivity, connected remote users and provided scalability for the growing business.

Challenges

MGKS has been in business for over 30 years. The company provides consulting services to more than 1,800 clients' retirement plans, with employees in Washington, Texas, Colorado, Virginia and New Mexico. Communications is critical to the company's success.

"As a services firm, our product is follow-up and follow through with our customers," says Alan Gold, CPA and shareholder, MGKS. "Communication is a critical part of our business, so the phone and computer are critical resources."

MGKS was experiencing continuous growth. "We started out with remote workers in Texas and Washington," says Gold. "As we experienced success with the remote-worker model, we started adding employees from other states."

MGKS had an aging communications platform, which made it difficult to accommodate the organization's increasing remote employee base. "Remote-employee communications was a huge challenge with our legacy system," says Gold. "It simply didn't allow them to seamlessly interact with our office and clients."

MGKS needed an updated communications solution that would better connect its existing remote workers and provide scalability to accommodate current and future growth.

Solution

MGKS considered a number of options to resolve its challenges. “We thought about providing dedicated lines for our remote users,” says Gold. “We thought about just providing them all with cell phones .” Gold contacted Canyon Telecom for additional options.

Mike Hosking from Canyon Telecom suggested UC for Business on the UNIVERGE SV8100 communications server from NEC. “As a pure IP solution, the SV8100 would provide the scalability MKGS needed,” says Mike Hosking, of Canyon Telecom. “With the organization being so distributed, UCB would allow them to function more cohesively, making everyone look as though they are in the same building even though they aren’t.”

Gold decided on the NEC solution because it not only addressed the company’s challenges, it also offered additional benefits. “We looked at the advantages the new solution would bring,” says Gold. “We realized there was a high ROI for this investment and that the system would pay for itself pretty quickly.”

MKGS is leveraging the NEC solution to provide seamless communication for both its local and remote employees. “Remote workers now have an office phone number that works as if they were sitting in our main office in Phoenix,” says Gold. “Callers can’t tell that they are in a different office, much less a different state.”

MKGS uses UCB to further improve communications. The solution’s rich-presence feature provides complete visibility of all users across the organization. “All employees at the main office, from executives to front-desk staff, can easily access remote workers,” says Gold. “Additionally, our remote workers can now easily access us as well as each other whenever they need to.” Rich presence allows users to be notified when someone is off the phone. Users can also set up greetings for different presence states.

MGKS has integrated the UCB solution with the company’s email application, allowing users to manage both their voice and email messages from Microsoft Outlook. “We can forward messages from Outlook to anyone within the company without having to translate it,” says Gold.

UCB’s email integration also improves efficiency. “We can now store voicemails in our client file by simply dragging it into our save area, I don’t have to type a memo,” says Gold. “This not only saves time, it also supports our company’s move to a paperless environment.” The feature also simplifies future file access.

MKGS’s executives also find the UCB solution helpful when they are mobile. “If I’m out of the office, I can easily schedule appointments or forward calls to my cell phone,” says Gold. “Being able to perform these types of tasks just saves me a lot of time.”

Results

MKGS now looks and acts as a more cohesive company. “Our new solution allows us to communicate much more seamlessly than before,” says Gold. “It’s like they are all sitting right in our main office.”

MKGS is also able to be more responsive to its clients. “The UCB solution saves us the time we spend on administrative duties, allowing us to focus more on our core business,” says Gold. “Plus, knowing where people are and when they will be back helps us focus on providing better, faster service to our clients.”

Gold is happy with the company’s new solution. “The NEC solution is scalable, easy-to-manage and provides the functionality we needed,” says Gold. “The solution also provides our remote employees full access to the resources they need to be productive.”

Gold attributes the success of the company’s new solution to Canyon Telecom. “Mike and his staff are very gracious and good to work with—they coordinated training, customized our manuals and I don’t think we had any down time,” says Gold “If we ever have a question, I can call Mike personally, and the Canyon Telecom staff is always here when we need them.”

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