

ShoreTel and Jones Waldo Holbrook & McDonough



Law Firm Jones Waldo
Holbrook & McDonough
Integrates ShoreTel IP
Unified Communications
System with
Business Tools

JONES
WALDO



CHALLENGE

- Jones Waldo Holbrook & McDonough's PBX-based phone system was no longer being supported by its vendor, but the law firm was at the point of considering a new Unified Communications solution anyway in order to capitalize on the cost savings, reliability, ease of management, and robust features.

SOLUTION

- ShoreTel provided the firm with a comprehensive Pure IP Unified Communications (UC) solution, including ShoreGear voice switches and ShorePhone IP telephones.

BENEFITS

- ShoreTel easily integrates with Jones Waldo Holbrook & McDonough's billing and timekeeping systems, which enhances the firm's ability to quickly and accurately record account activities and charges, as well as bill clients.
- Distributed architecture of the ShoreTel UC system means that even in the case of an unexpected event such as a natural disaster or the unlikely event of a failed switch, calls are rerouted to the other ShoreGear voice switches and business continues as usual.
- Rich feature set helps employees raise productivity and enhances customer responsiveness.
- Management is simplified and brought in-house, saving time and budget.

ShoreTel's UC System Integrates with Billing System and Provides Historical Log Entry Feature for Record Keeping

Jones Waldo Holbrook & McDonough is a full-service law firm with extensive experience in all aspects of corporate, business, real estate and litigation law. Based in Salt Lake City and with offices in St. George and Park City, Utah, and Naperville, Illinois, Jones Waldo Holbrook & McDonough is a firm of more than 85 lawyers providing a full spectrum of legal services for individuals, businesses, utilities, and governmental entities throughout the nation.

The Case for an IP Unified Communications System

In 2005, Jones Waldo Holbrook & McDonough was utilizing a Harris PBX-based telephone system, and the firm learned that Harris was no longer going to support the specific system it was using. However, this was not the worst news Jones Waldo Holbrook & McDonough could receive, according to David Clark, the firm's IT Director. Clark had been planning for Voice over IP (VoIP) and Unified Communications anyway, and was looking at new systems for the future. The fact that Harris was no longer going to support them with their phone system only meant the timeline would

move up and the law firm could begin capitalizing on the benefits of IP telephony that much sooner.

"I had specified that I wanted VoIP because we needed a workstation client and the stability you get with VoIP," said Clark. "We'd already prepared the company for IP telephony with Power over Ethernet switches a year before this, so we were ready with the infrastructure. Now it was just a matter of choosing the phone system." Clark and his colleagues looked at systems from Avaya, Cisco, InterTel, Mitel, Nortel and ShoreTel®. Cisco was eliminated pretty quickly because of its high cost, while Avaya was removed from the competition because Clark did not like the fact that a great deal of the solution was based on software, and some of the software was from a third-party vendor. InterTel's solution was not mature enough at the time, and Mitel and Nortel did not offer all the features the organization needed.

The Decision

Clark liked the fact that ShoreTel's IP Unified Communications system had been built from the ground up, and that it met all of the law firm's top criteria: reliability, scalability, ease-of-use and management, and robust functionality, such as the ability to store notes with calls for



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future reference. “There are a lot of things about the ShoreTel system that impressed us, especially ShoreWare® Personal Call Manager,” said Clark. “We’ve also integrated ShoreTel with our timekeeping and billing systems so we can accurately represent phone charges with the right client records.”

With the help of its integration partner, TecCon (also based in Salt Lake City), ShoreTel provided Jones Waldo Holbrook & McDonough with four ShoreGear® 120 voice switches for its Salt Lake City location, one ShoreGear 40 voice switch in St. George, and one in Park City. Also deployed are 250 ShorePhone™ IP telephones, mostly models 530 and 560.

The Right Choice for Enhanced Productivity

ShoreTel UC systems are easy to use, simple to manage, flexible, and reliable. With the ShoreTel system in place, integrated directly with Microsoft Outlook®, all Jones Waldo Holbrook & McDonough employees are now on the same phone and voicemail system, using 4-digit dialing to reach co-workers, dialing co-workers by name, and enjoying contact screen pop and calendar integration. ShoreWare Personal Call Manager enables employees to manage all of their communications—voicemail, e-mail, faxes—centrally on their desktop. With it, employees can quickly browse contacts and make calls from local directories or Microsoft Outlook. Voicemail messages are also stored in the industry-standard WAV Audio for Windows format, allowing users to play them on PCs, attach them to e-mail messages or embed them in other documents.

Personal Call Manager’s Find Me capability allows the law firm employees to program their phones so that calls track them down to their cell phones or another phone (home, hotel, etc.) when they are out of the office. Jones Waldo Holbrook & McDonough employees can also easily program customized responses to meet their individual needs. With just a mouse click they select from an array of call handling options to manage incoming calls when in a meeting, working from home or out of town. They can customize greetings, forward calls to another number, specify how quickly voicemail

should pick up calls, and be notified when a voicemail message is received—via e-mail, cell phone or pager.

In addition to powerful Personal Call Manager, ShoreWare Operator Call Manager provides the law firm receptionists and secretaries with key information and control, enabling a significantly higher level of personalized attention for callers. For example, before even answering an incoming call, a call-routing log displays the caller’s experience within the system to the secretary. In addition, before transferring the caller any further, the call-transfer screen displays who is available and who is not, avoiding the possibility of sending callers to an extension that is busy, which can be frustrating for callers. With the complete company at their fingertips as well as knowledge about the calling and called party, secretaries provide the highest level of care for callers.

“The receptionist uses a wireless headset and manages all her calls from her computer,” said Clark. “She doesn’t even have to touch the phone with the ShoreTel system. And she can see the status of people to whom she wants to transfer calls, which provides her with better information to make the best decision about calls she’s handling. It’s also much simpler for her to transfer calls based on last name or first name or even part of a name. ShoreTel has simplified everything for her.”

It is also easier for the receptionist and attorneys to initiate their own conference calls, which is a big improvement over the previous solution. “Setting up a conference call is no longer difficult like it used to be,” said Clark. “It wasn’t unusual for mistakes to be made while setting up a call and a user would have to start all over if they reached a participant’s voicemail. Now it’s easy to back up and dial another participant rather than starting the whole process over again. Conference calls are important to our business so ShoreTel’s ease-of-use is important to us.”

ShoreTel’s Workgroup capability enables the law firm to dedicate a specific telephone number to a workgroup. The organization currently has three workgroups set up: one for information systems, one for word processing



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and one for facilities management. Calls into each workgroup are routed to the next available agent. Productivity is enhanced, and callers get more consistent and thorough care.

Finally, ShoreTel’s hunt groups capability ensures all calls are answered by a live person rather than voicemail by ringing extensions in a specified sequence or ringing multiple extensions at once (depending on the company’s preference at any given time). Jones Waldo Holbrook & McDonough has receptionists across the organization—at the main site and at remote sites—included in one hunt group, which ensures that a call into any of the sites is answered live. There is also a hunt group set up for fax machines, which ensures a fax machine always picks up and that faxes waiting to be sent always successfully go through, which is crucial in an attorney’s office.

“It’s crucial that calls are answered live and that faxes get through, and with the ShoreTel UC system, that happens in just a couple of rings,” said Clark. “All of the features that ensure the phones are answered quickly have enhanced our client relations. There’s not always someone at the front desk in our remote offices to answer the phone, but with ShoreTel, the phone is still always answered. This promotes better client relations. Clients also like the Find Me feature because it’s easier for them to reach the person they want, and employees can easily find colleagues. ShoreTel has improved both our internal and external communications greatly.”

Integrated Tools for Better Business

Jones Waldo Holbrook & McDonough has integrated the ShoreTel system with its long distance billing system and its timekeeping system. This means that if an attorney makes a long distance call on behalf of a client, the attorney can enter the client’s account number and the charges—both the toll charges and the time spent by the attorney—are reflected in the invoice for the client.

Another tool the law firm’s attorneys find valuable is the history recording feature within the Personal Call Manager screen pop. When an attorney is speaking with a contact and the contact’s information is on the computer screen, information can be entered into the

history field. It’s also easy to add a note to a stored call, which means an attorney can add information to a record for a call that has happened in the past so that all appropriate references are documented. In the legal industry, this record-keeping capability is priceless.

“In Personal Call Manager, you can right click on a call and insert a note, which can be just a note about a conversation topic or you can actually type in specific comments,” said Clark. “Our attorneys love this feature about the ShoreTel system. It’s the most important aspect of the phone system.”

Distributed Architecture for Reliability

A key feature of the ShoreTel UC system is its distributed architecture design, which makes it ideal for multi-site organizations that span multiple locations, like Jones Waldo Holbrook & McDonough. ShoreTel’s Call Control software is distributed to every voice switch, which eliminates any single point of failure. In the highly unlikely event a ShoreGear voice switch fails, the other switches on the network automatically take on the call-processing load. So, with the distributed nature of the ShoreTel system, it is easy to reroute calls and continue business as usual.

“I liked the redundancy aspect of ShoreTel, the ability to self heal and still get calls through another office if there’s a problem at one of the sites,” said Clark. “The distributed architecture is important when you need to ensure reliable communications.”

Simplified Management Saves Time and Money

Jones Waldo Holbrook & McDonough uses ShoreTel’s ShoreWare Director, a browser-based management interface that allows an IT administrator to manage every site, including voicemail, automated attendant and desktop applications. In order to add a new user, the administrator simply clicks “add new” and enters the user’s name, which automatically updates the centralized database and every voice switch. Furthermore, once the new user is added, a mailbox is created, the automated attendant dial-by-name and number feature is



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updated, and online directories are revised. The entire process takes just a few seconds. Changes are just as quick and easy.

“I like ShoreWare Director, it’s very easy to manipulate the entire phone system from one location,” said Clark. “Not to mention that we no longer have to pay a service provider to do it for us. We’ve grown 20 percent since implementing the ShoreTel system as well, and it’s been so easy to integrate new people quickly. It’s important to be able to transfer extensions quickly and easily between remote offices or even home offices and not suffer any employee downtime because of those changes. ShoreTel helps us makes those changes seamless and easy.”

Case Closed

Jones Waldo Holbrook & McDonough has improved its internal and external communications and enhanced productivity and client responsiveness with the implementation of the ShoreTel UC system, according to Clark. “I love the ShoreTel system—it’s scalable and solid enough that any organization can use it,” he said. “Attorneys can work from home and the features go with them, which is a big benefit since we have some attorneys who live more than a hundred miles from an office. The history keeping capability is huge, and it’s unique to ShoreTel. We love it. We can use the history notes to help us prepare reports and ShoreTel helps us with our billing and timekeeping records. You can’t ask for much more out of a communications system.”