Collaboration and unified communications inside financial institutions
Today’s presenter

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National leader of our Unified Communications (UC) practice. Specializes in assessing, designing, implementing and supporting UC and Contact Center solutions.
Challenges:

- Properly staffing all locations
  - Centralized vs. Decentralized Models
- Offering full services at all locations
- Internal meetings are either in-person or via a conference call bridge
- Social Media
- Mobile Workforce
Unified Communications - Defined

What is Unified Communications?

Unified Communications is the integration of the following components into an overall communications experience:

- Voice over IP Telephony
- Instant Messaging and Presence
- Conferencing – Voice, Video, and Web
- Voicemail and Unified Messaging
- Mobility and Teleworker
- Contact Center
- Team Workspace
Unified Communications for Financial Services

- Instant Messaging and Presence
- Audio / Web Conferencing
- Room Based Video
- Consumer Applications
  - Social Media
- Team Workspaces

<table>
<thead>
<tr>
<th>Service</th>
<th>Have now</th>
<th>Expect to have in 12 months</th>
<th>Expect to have in 24 months</th>
<th>No plans</th>
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<tbody>
<tr>
<td>Telephony (IP-PBX)</td>
<td>87</td>
<td>8</td>
<td>2</td>
<td>3</td>
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<tr>
<td>Telephony (Microsoft Lync Voice)</td>
<td>80</td>
<td>18</td>
<td>8</td>
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<tr>
<td>Instant messaging and presence</td>
<td>77</td>
<td>11</td>
<td>4</td>
<td>8</td>
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<tr>
<td>Standard UC (unified messaging, presence, softphone, etc.)</td>
<td>44</td>
<td>42</td>
<td>12</td>
<td>23</td>
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<tr>
<td>UC client on smartphones and tablets (softphone, presence, video)</td>
<td>46</td>
<td>15</td>
<td>13</td>
<td>25</td>
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<tr>
<td>Audio / web conferencing</td>
<td>73</td>
<td>11</td>
<td>4</td>
<td>13</td>
</tr>
<tr>
<td>Personal video (e.g. video clients, personal video terminals)</td>
<td>28</td>
<td>23</td>
<td>15</td>
<td>34</td>
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<tr>
<td>Room based video conferencing or telepresence</td>
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<td>17</td>
<td>15</td>
<td>23</td>
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<tr>
<td>Consumer applications (e.g. Skype, Twitter, Facebook)</td>
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<td>14</td>
<td>6</td>
<td>25</td>
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<tr>
<td>Enterprise social software (e.g. Yammer, WebEx Social)</td>
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<td>18</td>
<td>11</td>
<td>10</td>
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<tr>
<td>Team workspaces and content tools (e.g. SharePoint)</td>
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<td>18</td>
<td>6</td>
<td>25</td>
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</table>

Source: Ovum
Instant Messaging and Presence – UC Clients

Cisco

Microsoft

Mitel
UNIFIED COMMUNICATIONS CLIENT DEMONSTRATION
Conferencing – Voice, Video, and Web

Conferencing Solutions

• Voice, video, web and teams
• Screen and document sharing
• May be hosted internally or externally
Voicemail and Unified Messaging

**Voicemail**

- Centralized platform for all voice message storage and management

**Unified Messaging**

- Integration with email
  - Listen to voice messages in your email
  - Forward voice messages to other users

***Speech-to-text and text-to-speech are separate functions which may or may not be supported by the phone system.***
Mobility and Teleworker

Mobility Client

- Freedom to work – anytime, anywhere, on any device
- Full-featured client

Teleworker

- Remote or home office phone solution that is connected to the main phone system
- Same user experience as an office phone
Contact Center – No Longer Just a Call Center

Flexible Customer Omni-Channel Experience

• Voice, email, SMS, fax, social media, web chat

Seamless Agent Experience

• Single interface with Intelligent Routing

Management Insight and Resource Planning

• Real-time view of customer activity

Simplified IT Management

• Single point of configuration and administration
CONTACT CENTER DEMONSTRATION
Unified Communications – Customer/Member Example

Case Study: Customer/Member Services Department

Contact Process

- Customer/Member calls into the Services Department
- Integrate Contact Center with CRM
  - Call Routing Based on Caller ID
  - Call Routing Based on Account Number
  - Automatic Screen Pop of CRM with Client Information
- Customer/Member initiates a chat session
Unified Communications - Analytics
Business Value of UC – Why do we care?

Why are Companies Now Investing in Unified Communications?

• Increased productivity and efficiency

• Improved communications

• Support customers or using a variety of devices

• Serve customers more quickly

• Enhance customer experience
Universal Banker

Concept of the Universal Banker

Challenges

• Offering full service banking at all branch locations
• Extending bank business to remote locations

What do we do?

• Staff branch locations with at least one Customer Service Representative
• Setup a Huddle Room with a video conferencing solution to connect to an expert
• The Customer Service Representative assists the customer with anything locally while the expert servers the customer’s needs
Social Media
Unified Communications – On-Premise vs. Cloud

Things to Consider

**On-Premise**
- Up-front purchase with Annual Maintenance
- Allows for greater application integrations
  - Screen Pops
  - Database queries and modifications
- Full feature-set with greater flexibility
- May be managed by a third-party
- Requires carrier trunking
- Typically a lower cost of ownership over a six year period

**Cloud**
- Phones may be purchased or leased
- Feature-set is dependent on Provider’s offering
- Basic management performed via a Web Portal
- Robust/Redundant Internet connections
- Lack of local survivability
- Monthly-recurring cost model
- Lower startup cost
- Lack of Quality of Service controls
- Based on phone number portability
- Typically a higher cost of ownership over a six year period
Unified Communications – Other Considerations

Other Things to Consider

• Physical Phone vs. Softphone
• Call Recording
  - Ad-hoc
  - Real-time
• Call Reporting
• Operator/Attendant Console
• Carrier Trunking
  - SIP
  - PRI
  - POTS

• Faxing
  - Analog
  - Cloud

• Music On-Hold
  - Custom Music Stream
  - Marketing Messages
Unified Communications – Rapid Assessments

What is a Rapid Assessment?

Rapid Assessment helps answer these questions:

• Where do I start?
• Which solution is the right one for me?
• How much will a new solution cost over the long-term?
QUESTIONS AND ANSWERS