

Case Study

World Financial is part of a multi-billion dollar financial company that sells investment solutions to consumers. They operate in a very competitive market place where real-time seamless phone connectivity is a crucial business component. The financial market segment is volatile where time is of essence. Clients expect to reach an agent quickly to execute an order.


When a new branch opened in Oakbrook, IL about two years ago, the phone system World Financial wanted was to quick to have the least number of incoming lines. The aim was to minimize fixed recurring monthly telecom expenses. Teleprime provided a solution where just one provider serviced internet and analog phone lines. Teleprime set up the company's voice telephony as well as data network with prioritized voice.

World Financial has 8 sales agents. Each agent spends a majority of the work day in the field making sales calls. One receptionist phone was required. Phones for the agents would ring the company's phone system yet seamlessly connect to individual cell phones when the agent was out of the office.

Incoming calls are answered by an Auto Attendant (AA) when the receptionist is away from the desk. The AA prompts the caller to dial the party's extension or dial by the name. Once the party has entered the data, the system routes the call to the appropriate agent. Caller ID information of the customer (and not World financial) is displayed to the agent.

In situations where the agent is unable to answer, the caller is transferred to the system's voice mail, not voice mail connected to the individual agent's cell phone. When the caller leaves a voice message, an email is sent to the agent, anyone designated by the agent, plus the agent's manager so that several team members are made aware of this call ensuring a rapid response and a quick action regarding this matter. The recipient can retrieve the email aurally on a smart phone. Connecting to a PC

Immediate access to the client is of the highest importance to World Financial staff. To date, the system installed by Teleprime has performed flawlessly.

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- Teleprime Delivered:
- * A cost effective solution
 - * A custom solution
 - * Prompt access to an agent
 - * Trusted advice and counsel

The Quadro series products, give our customers the best of both worlds, the reliability of the traditional legacy network and cost efficiency of the IP network

About World Financial

World Financial Group (WFG) is an AEGOM company. AEGON is an international life insurance, pension and investment group based in The Hague, The Netherlands with business in more than 20 markets in the Americas, Europe and Asia.

Each World Financial Group associate in the United States and Canada is an independent business owner who is dedicated to providing clients nothing less than the best in personal service

About Teleprime

In business since 1992, Teleprime delivers best of class turn-key communication solutions for our clients. Our solutions enable our clients to respond at the speed of business, build stronger relationships, and reduce the costs associated with connecting to their customers. With over 20 years of worldwide experience with signaling, interface, VoIP and IP PBX technologies, Teleprime has implemented solutions in over 80 countries worldwide. Teleprime is also a working VoIP and IP PBX research partner with the Illinois Institute of Technology (IIT) in Chicago.

Our products and services include: Voice Services,(PSTN, POTS, SIP trunks and VoIP); Data and Connectivity Services,(DSL, Cable, T1 or higher); Small Business PBX, (Phone systems – Key systems, IP systems or hybrid); LAN infrastructure, (Cat 5e and 6e wiring); (switches, routers, firewall install and provisioning); IP Cameras for Security and Remote Monitoring.

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