

# Case Study



## OVERVIEW

### Client:

Tate & Tryon

### Industry:

Accounting and technology consulting

### Customer Profile:

Tate & Tryon is a certified public accounting and technology consulting firm providing its clients with technology, audit, outsourced accounting, tax, financial planning, and recruiting services.

### Challenges:

- Unreliable and limited telephone system
- Rapid internal growth
- Budget constraints

### Priorities:

- Reliability and scalability
- Cost-effectiveness
- Higher level of service and features
- Ease of management

### Technologies Implemented by Nortec Communications, Inc.:

- ShoreTel 100 Analog Phones
- ShoreGear-120/24 Voice Switches
- ShoreGear-T1 Voice Switch
- ShoreTel ShoreWare Director
- ShoreTel Operator Call Manager

### Deciding Factors:

- Ease of adding new users
- Remote office capabilities
- System flexibility and reliability
- Mobility features for operators and end users
- Ability to add any phone off the shelf –or– Ability to add any COTS phone

### Benefits:

- Improved Performance
- Reduced Support



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### Situation

Tate & Tryon is a certified public accounting and technology consulting firm providing its association, construction, consulting, foundation, law, medical, private school, publishing, real estate, and trade show clients with technology, audit, outsourced accounting, tax, financial planning, and recruiting services. The company blends technical skills with a thorough understanding of organizational needs to take ideas from conception to completion. Tate & Tryon professionals include certified public accountants (CPAs), Microsoft Certified Systems Engineers (MCSEs), Microsoft Certified Professional (MCPs), and Certified Management Accountants (CMAs), most of whom have advanced degrees.

In 2000, Tate & Tryon had an unreliable telephone system that it was rapidly outgrowing. The company determined its existing Data-Tel solution would have to be significantly upgraded with an entirely new component to support corporate growth, or it would have to go to a new system. "Knowing our growth would continue, it made more sense to look at implementing a new system that offered scalability as well as reliability and attractive end user features," said Greg Long, systems engineer at Tate & Tryon.

Tate & Tryon carefully evaluated solutions from 3Com, Cisco, Data-Tel, and ShoreTel, with the help of its longtime integrator, Falls Church, Virginia-based Nortec. Once Long and his colleagues saw ShoreTel's remote capabilities, and recognized the cost-effectiveness and ability to use any handset with the system, the choice was obvious.

"Nortec was instrumental in helping us determine exactly the right solution," said Long.



*"I'm out of the office doing other things a lot of time, so if I have to add a new user, it's so easy with ShoreTel to simply log in and do that from anywhere I have access to a browser."*

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## Solution

Nortec provided the organization with 55 ShoreTel handsets, three ShoreGear-120/24 Voice Switches, and one ShoreGear-T1 Voice Switch. Tate & Tryon also uses some Panasonic analog phones with the ShoreTel system. Nortec helped with the design and initial implementation and continues to provide annual maintenance for Tate & Tryon, offering assistance only with major infrastructure configuration changes, since the management of the ShoreTel system is so simple.

Long, who deployed Tate & Tryon's ShoreTel solution over a weekend with the help of one Nortec engineer in 2001, appreciates the cost savings over competitive solutions. "As we get new users, we can just buy a phone off the shelf at an office supply store and plug it in and it works," said Long. "No other vendors would allow us to do that with their solutions. With our growth rate, that's important."

Tate & Tryon uses ShoreTel's ShoreWare Director, a browser-based management interface that allows Long to launch a Web browser and gain access to the system from anywhere on the network. Through the browser, every site and station can be managed, including voice mail, automated attendant and desktop applications.

"ShoreWare Director is so easy to use, and I can make changes to the system remotely through a virtual private network, even from home," said Long. "I'm out of the office doing other things a lot of time, so if I have to add a new user, it's so easy with ShoreTel to simply log in and do that from anywhere I have access to a browser."

Tate & Tryon utilizes ShoreTel's Operator Call Manager for receptionists. Operator Call Manager is a flexible and powerful tool for managing calls and providing unmatched customer service, giving Tate & Tryon receptionists and operators maximum knowledge about each caller and the history of each call, allowing them to connect people—via a simple drag-and-drop interface—with the right party more quickly for optimal customer service. The flow of information about each call starts even before a call is answered. For every incoming call, ShoreTel displays on the receptionist's desktop a call-routing log tracking exactly where the caller has been—from the first to the last transfer. If a Tate & Tryon operator wants to transfer a call, the Extension Monitor also gives an overview of which extensions are free and which are busy—so callers can be directed to people rather than voice mailboxes.

*"We don't have to spend anything on support calls, whereas we used to have to get someone to come in to handle moves, adds, and changes. We can do it all ourselves with ShoreTel—the savings are significant."*

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## Benefits

In addition to the simplicity Tate & Tryon appreciates, the ShoreTel system has generated considerable cost savings. "We don't have to spend anything on support calls, whereas we used to have to get someone to come in to handle moves, adds, and changes. We can do it all ourselves with ShoreTel—the savings are significant."

Tate & Tryon employees run applications on their desktop that integrate directly with their phone system, driving improvements in productivity as well as customer satisfaction. Unified messaging sends voice mail messages to user email boxes, desktop call control allows users to route calls by simply dragging and dropping, and features like Follow Me Find Me allows calls to keep searching for employees no matter where they may be working. So customers reach live people more often, reducing the frustration level associated with reaching voice mail.

"The ability for our users to get calls to the right people quickly and make our customers happy is worth the cost of the system all by itself," said Long.

Everybody is pleased with all of the ShoreTel features, from dragging and dropping to accessing their voice mail messages on their computers. "The system is also very intuitive—I spent only a half hour showing them the basics, but it's so similar to Windows, it was easy for everyone to figure out the rest," said Long.

The ShoreTel system has been deployed for four years and Tate & Tryon plans to add ShorePhone IP phones and more switches in the future. "We see ourselves with Nortec and ShoreTel for a long time," said Long. "We appreciate their dedication to helping us continually improve our business."

*For more information on Nortec, please contact us at  
[contact@nortec.com](mailto:contact@nortec.com).*

*"Scalability, ease of management, and reliability were all priorities for Tate & Tryon. ShoreTel met all those requirements perfectly. As we did with Tate & Tryon, we always recommend ShoreTel telephone systems above the rest."*



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