CASE STUDY   **SWITCHVOX**

OVERVIEW

Searching for a phone system that would primarily provide better business continuity, the 1st Guard Corporation, a hybrid trucking insurance company located in Venice, Florida, spent nearly two years researching options that would improve disaster-recovery operations, integrate smoothly into their existing IT infrastructure, and provide relatively easy implementation. The 1st Guard Corporation is a two-pronged operation with one arm working as an insurance underwriter and the other acting as a full service insurance agency specializing in the lease-owner-operator trucking industry. They offer a variety of insurance-related products and services to their clients throughout most of the Lower 48. According to the company's marketing director, Courtney Wilson, although they have only 18 fulltime employees in the Venice location, 1st Guard posted annual profits in excess of $25 million, and have two satellite offices in Orlando, FL and Dallas, TX.

"We did an exhaustive search for the perfect telephony and we were considering an in the clouds system. I read about the Digium's Switchvox product on the Internet and watched a video that intrigued me," says 1st Guard chief information officer, Dan Ribar. "It was a late Friday afternoon about 4:30 when I entered an online chat session to ask some questions, thinking I would get an intern or someone who would pass me along to a representative on Monday. Lo and behold, I was online chatting with one of Digium's top sales representatives." Ribar continues, "Less than a minute after getting offline with, I received a telephone call from Tim Halleran of Secure Datacom, a Digium partner located not far from me in Sunrise, FL. I was floored at the immediacy of the response. Tim and I hit it off instantly."

"We first provided a test system so they could demo Switchvox in-house. We discussed coming out and setting up the system for them as part of our service," explains Tim Halleran, president of Secure Datacom. "But Dan assured us that in order to understand the system, they needed to do the installation themselves. It was an ambitious undertaking but the 1st Guard technicians are highly skilled with a strong technology background. They were fearless about the system and wanted to make sure they could handle anything thrown at them. All we did was order the equipment, answer some questions, offer some advice, and deliver it to them."

Switchvox Beats Out Cloud Options and Expensive Competitors to Provide Business Continuity and Cold Spare Solutions for National Insurance Company

CHALLENGE

1st Guard was operating an aging and proprietary Avaya IP Office telephone system, which was problematic for a number of reasons. Ribar makes it a point to explain that the company IT infrastructure was solid and cutting edge, easily integrated with several proprietary software packages written specifically for 1st Guard to streamline operations. "The Avaya system was six years old and the only piece, or application that did not fit. It just wasn't compatible with the expansion and growth of our infrastructure," he says. "Our phones and other equipment were moving down the food chain in terms of age and we were locked into replacing them with proprietary Avaya equipment, which are not only more expensive, but based on a system that was incompatible with our long term IT growth strategy." Additionally, Avaya only ran on a Windows platform and could not be integrated into a Macintosh or Unix operating system; and essentially, Avaya had 1st Guard hardware-locked, that is, their in-house software applications and softphones did not function fully, or at all with the old telephone system.

One particular challenge they faced was company back-up procedures and disaster recovery. Their co-locations in Orlando and Dallas consist of secure buildings in which they rent rack space for hardware backup purposes. 1st Guard needed a secondary Cold Spare linked to the corporate headquarters in Venice via an open API (Application Programming Interface) set of technologies so 1st Guard could simply make a single call or "flip a switch" in the event of fire, natural disaster, or any other catastrophic event; and have the Dallas location immediately pick up operations. These means of safeguarding against the company's ability to answer phones, continue to conduct business, or recover financial records or business data, were not possible with the Avaya system.

1st Guard's initial searches for an alternative phone system produced some options, but nothing that inspired Ribar and his team to make a final purchasing decision. "We were getting fairly serious about an in the clouds system called 5Nine," Ribar explains. "I believe it is a great application and I watched it and studied it for about a year." Essentially, 5Nine is an Internet hosted call center software application that operates "in the clouds", that is somewhere out on the Internet. Although an appealing option, according to Ribar, he felt 1st Guard would sacrifice much more customization than he was willing to give up.

"We had to look at a Cisco system too," Ribar admits. "Cisco has been around a long time, has an excellent reputation, and they are a safe system. But we were looking at a huge expense."

SOLUTION

Enter Digium. "I'll be honest with you," Ribar admits. "The more I researched Digium and spoke to Tim about Switchvox's capabilities; it just looked too good to be true." 1st Guard set up a test system at the Venice facility and Ribar and his team began testing the environment, expecting to find all kinds of glitches, particularly when they began integrating their own, proprietary software packages. "My guys are good but the implementation was relatively easy so that too set me thinking something had to be wrong with this picture.

"We ran that demo for several weeks. Every company, no matter what type or size of your business, is reluctant to change or lose a capability. You just expect when you turn something as centralized as your telephony system on its head, you are going to lose something or something is going to change so drastically, you will be looking at a huge learning curve. We honestly tested every nuance of the Digium system and within two weeks, we were sold."

IMPLEMENTATION

1st Guard purchased the Switchvox 4.6 with a couple of Polycom hard phones for use in the executive offices; and Bria softphones by Counterpath for the customer service representatives. The Brias are a next generation softphone application that lets 1st Guard make VoIP and video calls over IP from their computer desktop, replacing their Avaya hard phones. Built according to SIP (Session Initiation Protocol used for establishing sessions in an IP) and open source standards, Bria is effortlessly compatible with the Switchvox PBX switchboard interface.

By setting up a Switchvox AA305 Cold Spare VoIP PBX appliance in their Dallas location, the disaster recovery problem was instantaneous solved.

"Another important factor we had to take into consideration was the redesign of our inbound call queues," Ribar explains. "The Switchvox system actually helped us with that implementation." Company philosophy requires that every call during business hours be routed to a person and not voice mail, therefore 1st Guard uses a single

automated menu with set parameters and call rules that routes every call appropriately. The Switchvox queue management feature queues customer representatives with real-time message-based information, displaying detailed information about inbound calls. Reps can see what calls are unanswered and what calls are on hold. Queue management also provides call data, displaying statistical information that helps management analyze and track call volume and quality.

Customizable at a touch, Switchvox lets 1st Guard easily set call rules that cascade after-hour, holiday, and weekend calls to personal iPhones, Blackberries, cell phones, or other means of communication, without using a separate application.

Detailed logging provides ongoing records showing what the system is doing. Using a salesforce-style switchboard panel, reps can see who is calling, read any notes about the caller by other reps, and see their name and email address - before they answer the phone. Reps can also log new calls; update contact information; see the call log in real-time; or pull a log periodically for review.

Ribar's concerns about integrating the company's "homegrown" business applications like ATHIA and their call recording software, CACTI, were immediately alleviated with Switchvox's easy integration points.

The newest Switchvox version 4.6 also offered several new features including:
- Additional hardware configuration span options for Timing Source
- A new automatic IP blocking feature that blocks network access for suspicious IP numbers available by default, with adjustable settings
- Simplified tech support
- Strengthened passwords for extensions and phones available by default or capable of being shut off
- The separation of "Download" and "Apply" options in the Update process
- A PRI Bearer Channel now has a "Wait Duration" setting available
- Echo cancellation is now handled by the software rather than the hardware

RESULTS

After two years researching and investigating telephony options that would give them customization; immediate Cold Spare secure backup and disaster recovery; full software and hardware integration; and a shallow learning curve; Ribar made his Digium discovery on Friday September 8 at 4:30 p.m. With a staff well versed in technology, they installed a demo system; learned how it worked; tested all their software applications; bought the Switchvox; and had it working with very little if any training in 2½ months without any surprises, problems, snafus, or disappointments.

Ribar said, "When the Switchvox system arrived, it came as a single rack system in a box. If we had purchased the same "add-ons" to the Cisco system that come included in the single Switchvox system, we would have paid three times the money… no probably four or five times the money… for no extra functionality."

Digium's vision is a world based upon open communications.

Our mission is to transform the way businesses acquire and operate their communications systems through the application of open source software.

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