



Customer Profile: Open Solutions

Software Developer Maximizes Customer Service and Creates New Market Opportunities with TeleVantage

A successful developer of CRM and ERP software, Open Solutions Inc. fully understood the importance of exceptional customer relationships and service to the business equation. As a leader in business automation solutions for more than 20 years, Ontario-based Open Solutions prides itself on helping its customers improve their business with a holistic, 360-degree view of the organization. But when Open Solutions examined its own business practices, the company discovered that their phone system was holding them back. When it came time

to choose a new phone system, they searched for one that would integrate easily with their own core product — ResQ Enterprise, reduce costly maintenance and administration fees, and be easy to use. And most of all, they wanted a system that would allow them to leverage the maximum benefit from both products — a perfect blend.

Problem

- The administrative costs and functionality limits of the existing phone system were financial and productivity drains.
- The inability to share calls or messages prevented Open Solutions from providing the best service and support possible.
- Remote workers found it difficult to communicate with the home office and customers.

Solution

- Open Solutions chose TeleVantage, Artisoft's software-based telephone system.
- With TeleVantage, remote workers have complete access to the phone system's advanced features from any Web browser and any telephone.
- Because of the phone system's open API, Open Solutions was able to integrate their CRM product with TeleVantage to achieve the maximum benefit from both products.

Result

- Access to customer data via a single application and the sharing of information have enabled Open Solutions to improve customer service and increase staff productivity by 5%.
- By eliminating maintenance fees and using the call reports and logs to apply resources appropriately, Open Solutions has been able to save more than \$4,000 annually.
- The powerful combination of TeleVantage and ResQ Enterprise has created new market opportunities for both companies.

Ease of Integration Leverages the Best of Both

Open Solutions found the ideal solution in TeleVantage, Artisoft's software-based phone system. The clear and comprehensive Application Programming Interface (API) that TeleVantage provided promised to make their integration goals a reality. "We are always looking for tools to provide add-on solutions for our CRM application, so we were very excited when Artisoft announced the availability of its API. Our experience shows that Artisoft is committed to providing solutions that other software companies and integrators can really use," recalled Brad Dempsey, President and Chief Architect of Open Solutions.

The integration was an immediate success. Open Solutions' developers were able to produce a polished Windows-based interface using the TeleVantage API in days, when a similar task with their old PBX API would have taken months. "We had developed 'hooks' into our software from other manufacturers' telephone solutions in the past, but Artisoft's API exceeded our expectations by a long shot. We found the openness of design and clarity of the object model to be unprecedented in the telephony industry. We were really pleased with the depth of the offering," commented John Graham, Vice President of Business Development at Open Solutions.

The functionalities of TeleVantage and ResQ Enterprise were a natural combination and the integration helped Open Solutions increase sales and productivity. "Most business is still conducted over the phone, and if you can integrate the phone system with your customer database, you will complete more sales," said Dempsey. Based on the incoming caller information identified by TeleVantage, a customer record will pop up on the user's computer screen, saving the 30 seconds usually needed to retrieve a record from another application or ask questions that



the customer has already answered in previous calls. This translates to increased staff productivity of at least 5%, which can mean thousands of dollars to a medium-sized business. The call handling features of TeleVantage, such as beginning, transferring, recording, forwarding and conferencing calls, can all be completed within the ResQ Enterprise application. Users in need of advanced call management capabilities, such as call routing, can still launch the TeleVantage client, but the integration allows almost everything to be done without leaving the CRM environment.

Administration Saves Time and Money

Open Solutions soon discovered many additional benefits that TeleVantage delivers. They immediately noticed a dramatic reduction in administration costs, as most changes could now be handled in-house. "Our old PBX system required a technician to come to the office every time there was a programming change needed, even just adding an extension," noted Graham. In many cases, a technician would not be available for days, hindering new employees from being fully productive while they waited for their extensions to be connected. "With TeleVantage, we have total control over our communications needs — all employees have the ability to adjust their own configurations and the administrator easily manages the entire system." Eliminating annual service fees of \$1,500 was only the beginning of savings.

Valuable Information Enhances Business

Another significant benefit was the culling of information that enabled the company to do more business. With the comprehensive reports and logs, they now know what is happening on all the lines, when trunks are nearing capacity, and which clients are calling the most often. Problems are identified and corrected long before they become emergencies.

Improved Customer Service & Tech Support

Because Artisoft is a software company, they understood Open Solutions' need to provide excellent customer service. "This is critical to a software company, especially one like Open Solutions, since we produce software that runs our customers' businesses," said Graham. They soon found that TeleVantage helped their staff to be even more responsive. One major advantage was the ability to record calls, and to send calls and voice mail messages via email. Previously, in order to share a customer's call, staff members had to either transcribe it or bring others into the office to hear it. Now, service reps can relay the

customer's exact words and tone, helping to ensure an accurate, as well as friendly, response.

TeleVantage immediately helped Open Solutions improve its technical support operation. The support staff found the ability to have shared mailboxes especially helpful. When a caller leaves a message, several people can have access to it and act on it quickly. TeleVantage also made it easy to handle a high call volume, helping the staff to juggle multiple calls and use call screening to correctly assign priority. And with no key codes to memorize, there were no longer any mishaps in parking or transferring calls, or in retrieving a call when several people were on hold.

Full-Featured Access, On- and Off-Site

Like many software companies, Open Solutions offers training and consulting, and this can mean weeks at a remote location. With TeleVantage, remote workers remain reachable at their usual phone number and still have complete access to the system's advanced features. Users can control which calls are seamlessly re-directed to the remote site and which go to voice mail. And the Web Client enables remote workers to log in to their TeleVantage account from any browser to listen to voice mail, manage call rules, or place calls using the home office's lines, saving on long-distance charges.

An Outstanding Alliance for a Promising Future

After achieving substantial benefits internally, Open Solutions realized the integration would allow them to pursue a new market opportunity — selling to TeleVantage customers who require an advanced CRM system. "The integrated solution proved to be more than the sum of its parts, generating new business opportunities for both companies," said Dempsey. Open Solutions joined Artisoft's Open Communications Alliance, a group of innovative technology vendors working with Artisoft to deliver standards-based communications solutions with TeleVantage as the focal point. By adding an advanced communications system to business automation software, Open Solutions is able to offer a comprehensive CRM/ERP solution to optimize customer service and enhance employee productivity. "Not only is TeleVantage improving our business internally, it's allowing us to generate new customers as well," said Dempsey.

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