

INTERACTIVE INTELLIGENCE



Glenview State Bank Deploys SIP-based Interaction Management Software for Improved Branch Office Communications

CASE STUDY

“When we first signed on as an Interactive Intelligence customer last year we shied away from VoIP, thinking that it was perhaps cost-prohibitive and a rather immature technology on which to build our entire communications system. We decided to become a SIP beta customer for Interactive Intelligence earlier this year, however, when we learned that CIC 2.2 included a built-in SIP stack, which significantly reduced complexity and cost. We are now routing voice traffic from six locations over our wide area network. CIC enabled us to easily migrate to SIP without sacrificing our investment in application development. Between the fully featured SIP phones and elimination of intermediary devices, we’ve found CIC 2.2 to be an incredibly cost-effective and flexible solution.”

—Lee Bostrom, Chief Information Officer,
Glenview State Bank
May 6, 2002

ABOUT GLENVIEW STATE BANK

Glenview State Bank is a community bank with \$750 million in assets serving individuals and businesses through its six facilities located in Illinois. The bank specializes in technology investments while maintaining a strong commitment to customer service and satisfaction. Glenview State Bank employs approximately 240 people. The bank was founded in 1921 and is headquartered in Glenview, IL.



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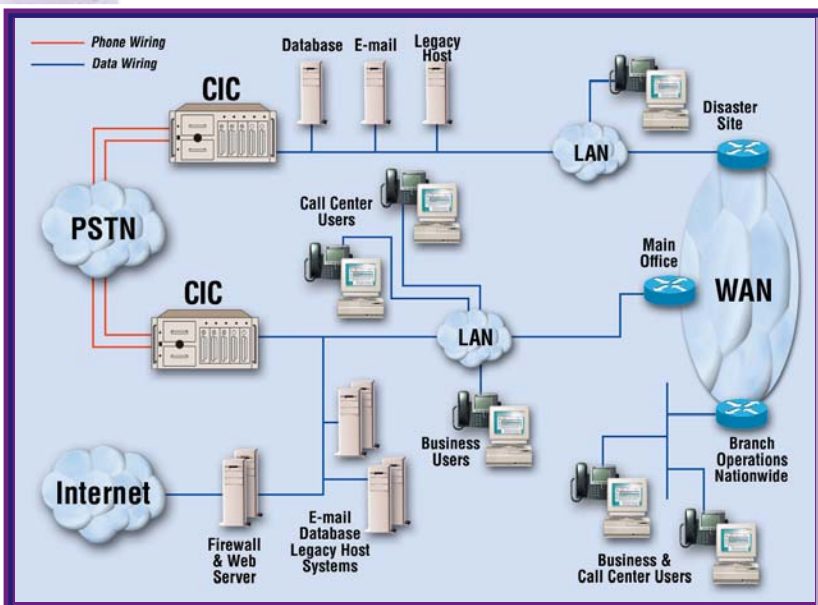
THE PROBLEM

Upon completing its Y2K remediation at the end of 2000, Glenview State Bank decided that it had outgrown its Rolm PBX, which was installed at its main office as a standalone key system. The Rolm PBX had no disaster recovery mechanism or E-911 capability—a method by which emergency or “911” telephone calls in the U.S. are switched from E-911 control offices to the public safety answering point using automatic number identification.

The PBX was also not able to cost-effectively support the bank’s growing number of distributed offices, nor did the system efficiently manage interactions across multiple communication channels. “The banking industry has stringent regulations governing the confirmation of transaction orders like wire transfers,” says CIO for Glenview State Bank, Lee Bostrom. “As a result, we were looking for a system that not only met our enterprise telephony needs, but one that also provided us with a way to consolidate transaction processing and cataloging for interactions like e-mails and Web chats.”

THE SOLUTION

Glenview State Bank began looking at other traditional PBXs but expanded its search to include non-traditional systems that might more easily integrate to its Windows-based IT infrastructure. To help with its search, the bank solicited the expertise of Northbrook, IL-based Digital Voice Systems (www.dvsweb.com), a provider of business telecommunication and workflow automation solutions. Based on the bank’s requirements, DVS recommended an open, Windows 2000-based “all-in-one” communications software system from Interactive Intelligence called *Customer Interaction Center™* (CIC). Initially, the bank was attracted to CIC’s Web chat functionality. Upon further investigation, however, it learned that the product offered everything the bank needed—from an enterprise-wide phone system, to a sophisticated multimedia contact center solution. Perhaps even more compelling, however, was the



**CIC's SIP architecture simplifies
communications infrastructure
for distributed organizations**

fact that CIC functioned independent of the bank's network layer so the product could easily migrate from one switching platform to another without Glenview losing its investment in application development. With plans to migrate to a Voice over IP infrastructure in the near future, the bank felt that CIC was a perfect fit.

In early 2001, DVS completed the bank's CIC deployment, which replaced the Rolm system with a single server supporting 240 users. The single-platform solution gave the bank full digital PBX functionality, voice mail, unified messaging, fax services, presence management, multimedia queuing and routing, interactive voice response, Web functionality, reporting and supervision. DVS also installed *Interaction Recorder*[®], a CIC add-on product that enabled the bank to easily record, archive and review all interactions.

By the end of 2001, the bank's plans to migrate to VoIP coincided with a new release of CIC that supported the session initiation protocol—an emerging standard for IP-based telephony. This new version of CIC included support for media processing boards from AudioCodes Ltd. for compatibility with a variety of SIP-compliant IP phones and softphone clients.

"At first we were leery of the SIP technology since we had heard that it might be cost-prohibitive," says Bostrom. "But when we reviewed CIC's architecture and discovered that it could power an entire SIP network on a single server—complete with SIP-compliant proxies and registrars—we decided that we had much to gain and little to lose by converting over."

DVS installed the SIP version of CIC at the bank's Northfield branch in March 2002, followed by the remaining offices in April, for a total of two servers supporting 240 users across six offices. Today, the bank routes voice traffic from all six locations over its wide area network and has installed all branch offices with a total of 40 SIP phones.

Also in early 2002, DVS began a configuration to enable CIC to work with the bank's local E-911 service from Ameritech so that outbound calls could be routed to the correct PSAP based on the appropriate direct inward dial number. DVS also began setting up a redundant CIC SIP system as a disaster site at the bank's Northfield branch to automatically switch calls from the main office to the branch office should the network go down.

THE BENEFITS

Glenview State Bank cites CIC's unified, multi-channel architecture and SIP support with helping it to increase productivity, reduce costs and enhance customer service.

"Since installing CIC, we've used a single IT administrator to manage the entire system," says Bostrom. "We credit this to CIC's unique architecture, which provides a single graphical administrative console to accomplish everything from phone line configurations to security settings. "In addition, CIC's exceptional reliability has minimized our administrator's time spent troubleshooting for even greater productivity gains."

The bank is also using CIC's Web chat to provide customers with enhanced levels of service. Approximately six agents from the bank's teleservices and customer support groups field Web chats, which are initiated when a customer clicks on a Web chat button to initiate a real-time dialog via a window that's popped onto a computer screen.

According to Bostrom, however, perhaps the biggest benefit of CIC has been its SIP capability. "With the SIP version of CIC, we've been able to provide our employees at each of our sites with advanced communications features without having to install multiple phone systems. Based on our cost savings to-date, we're already planning to use CIC for a new office scheduled for completion in October. This office will support 30 to 40 agents and we'll incur absolutely no phone infrastructure or service acquisition costs since it will be built right into our data networking design—all we have to do is install units at the workstations. Plus, there won't be any intermediary equipment to buy since all the functionality we need will be embedded in the CIC server.

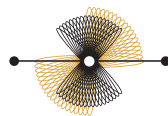
"I guess if I had any advice to give to other distributed companies looking for a new communications solution I would tell them that a SIP-enabled, 100 percent standards-based software system can save them a ton of money as well as prepare them for future advancements in technology. As an organization that operates in a pretty conservative environment with very little tolerance for downtime, I think we set a good example of the kind of benefits this technology can bring to companies of all sizes and in all industries."

ABOUT DIGITAL VOICE SYSTEMS INC.

Digital Voice Systems (DVS) is a Midwest distributor of Interactive Intelligence software located in Northbrook, IL. DVS was founded in 1987 and is focused on delivering a wide range of advanced contact center solutions. Contact DVS at 847-564-4387 or www.dvsweb.com

ABOUT INTERACTIVE INTELLIGENCE INC.

Interactive Intelligence (Nasdaq: ININ) is a global developer of multi-channel customer interaction management software. The company was founded in 1994 and has a worldwide customer base of more than 900 companies. Interactive Intelligence has won numerous awards, including Software Magazine's 2002 top 500 global software and services companies and Frost & Sullivan's 2001 entrepreneurial company of the year. Company headquarters are located in Indianapolis, IN, with more than 20 offices throughout North America, Europe and Asia.



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