



## > TRANSFORMED CUSTOMER SERVICE FOR LEADING SCOTTISH FINANCIAL INSTITUTION

**NORTEL**



### Case Study

#### **Dunfermline Building Society**

"Nortel was the logical choice for us as we have been working with them for 12 years already. The Nortel Communication Server 1000 is a great system, which did exactly what we needed."

> **Ian Forrest,**  
**Telecommunications Manager,**  
**Dunfermline Building Society**

### The scenario

Exceptional customer service is vital for every business, but especially where personal banking is concerned. The need to interact with customers efficiently, in a way that suits them, is essential.

As Scotland's largest building society, Dunfermline Building Society wanted to improve the flexibility of its customer service. To do this it sought a more sophisticated communications infrastructure, as Telecommunications Manager Ian Forrest explains: "Our old telephony systems were costly to maintain with limited functionality. We wanted more efficient, flexible technology, particularly for our telephone banking operation, Dunfermline Direct. The idea was to provide more innovative interaction between our customers and the business."

As the Society already had a BT-supplied Nortel Meridian system, Ian approached them to discuss future plans. Brian Kerrigan, ICT Sales Manager for BT, immediately understood the requirement: "The Society needed a contact centre solution which would help it interact with customers via other methods than just the phone; a true multimedia solution. They also wanted to run structured, outbound marketing campaigns for different financial products."



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> **Ian Forrest,**  
**Telecommunications**  
**Manager, Dunfermline**  
**Building Society**

## The solution

BT and Nortel provided a complete communications system for Dunfermline Building Society's head office, the contact centre, 34 branches and two further commercial offices. This included the Nortel Communication Server 1000 at head office plus the Nortel Contact Center 6.0 for Dunfermline Direct and the Nortel CallPilot voice messaging system for all staff. To complete the solution, Nortel Business Communications Manager 50s were installed at each of the other 36 sites, with Nortel Business Series Terminal handsets.

The solution gives Dunfermline Building Society:

- **Improved customer service** and a more streamlined approach for contact centre agents
- **Detailed management information** on the contact centre's activity, broken down to individual campaign level
- **A platform for future technology developments** including a move to Voice over IP (VoIP)

## The results

The Society can now communicate with its customers more innovatively through media such as email and SMS. The marketing team can run sophisticated marketing campaigns from the contact centre to promote insurance, ISAs and mortgages. What's more, the Society can monitor contact centre performance through call statistics and activity reporting. "We can also integrate the system with our customer database using Computer Telephony Integration (CTI) technology. This improves service further by giving our agents access to the calling customer's details as soon as they answer the phone," Ian adds.

Dunfermline Building Society is now investigating the possibility of installing a new Nortel LAN. "This will enable us to put our telephony over the data network in order to save costs and overflow calls from the contact centre to branches during busy periods".

Dunfermline Building Society plans to build on this investment over the next two years as part of its ongoing customer satisfaction strategy. Ian concludes: "We have searched the market for alternatives, but Nortel have the best solution for our business needs."

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